



SAP Concur

PROCUREMENT SERVICES DIVISION



End-USER Training

How to Submit a Travel Expense
Report on Behalf of Another
Employee
(for Site Travel Specialists)

The purpose of this job aid is to show Site Travel Specialists on how to submit a travel expense report on behalf of another employee

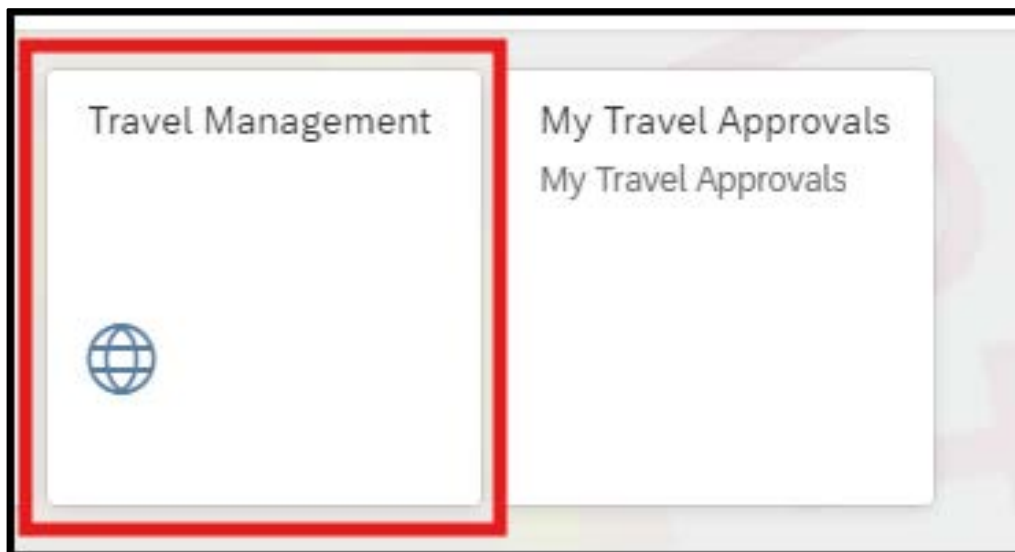
1

To access Concur Travel, log in to your ESS (<https://ess.lausd.net/>) using your SSO (Single Sign On).



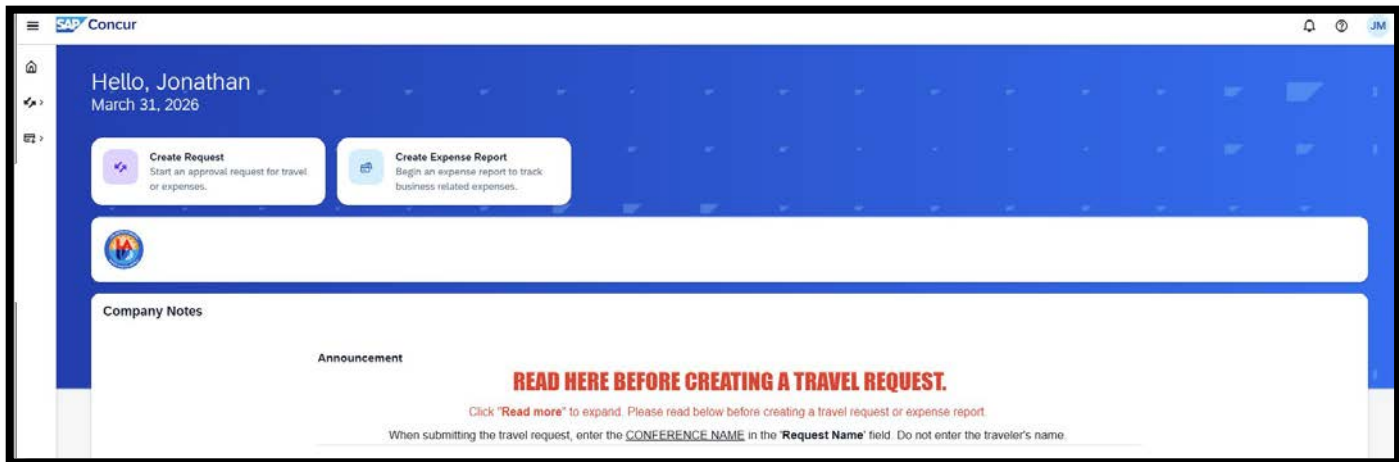
2

Click on the **Travel Management** tile.



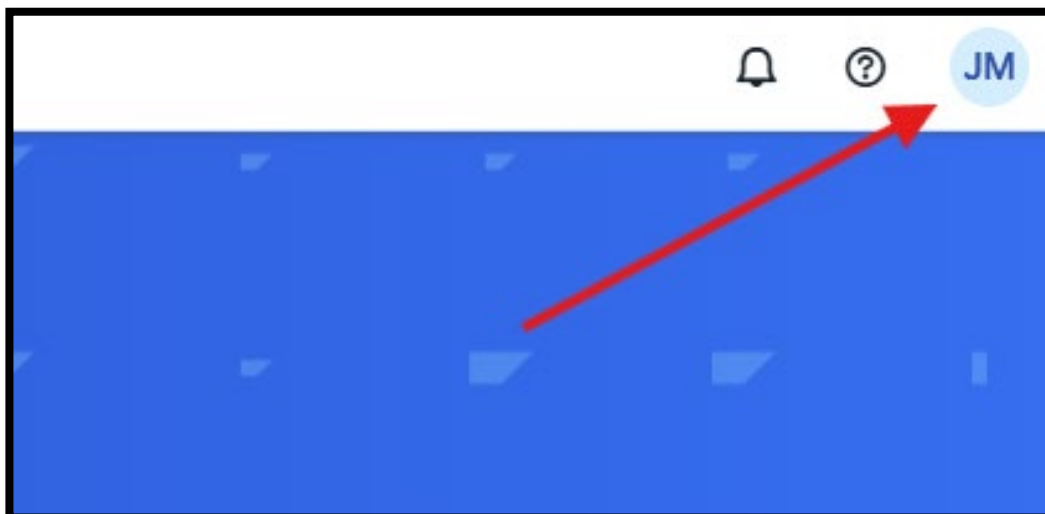
3

You will be directed to the Concur Travel home page. Display may look different depending on your view settings.



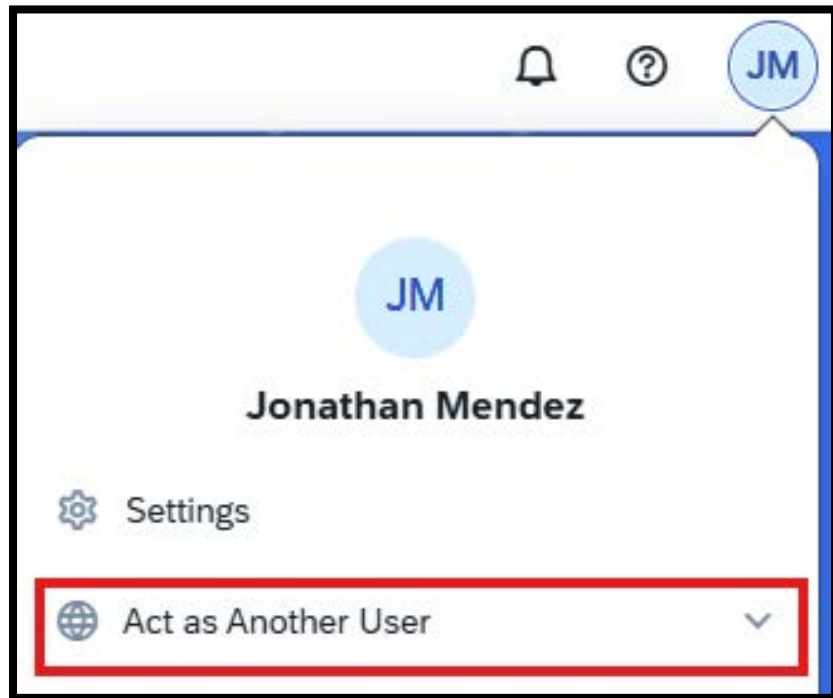
4

Click on **your initials** or **person icon** on the top right corner.



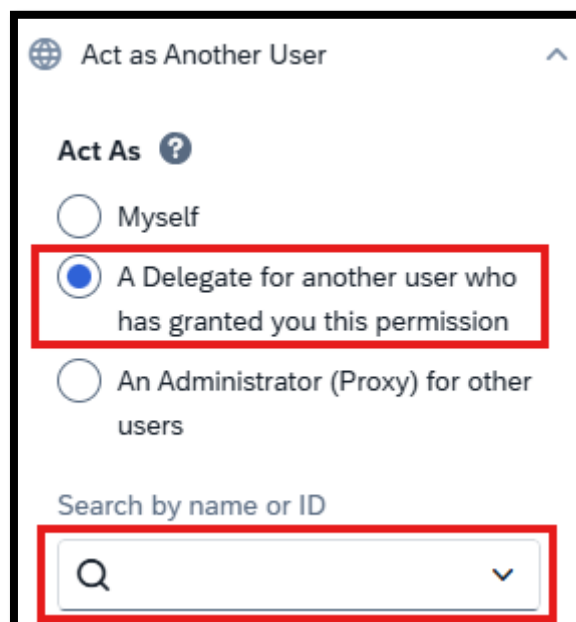
5

Click **Act as Another User**.



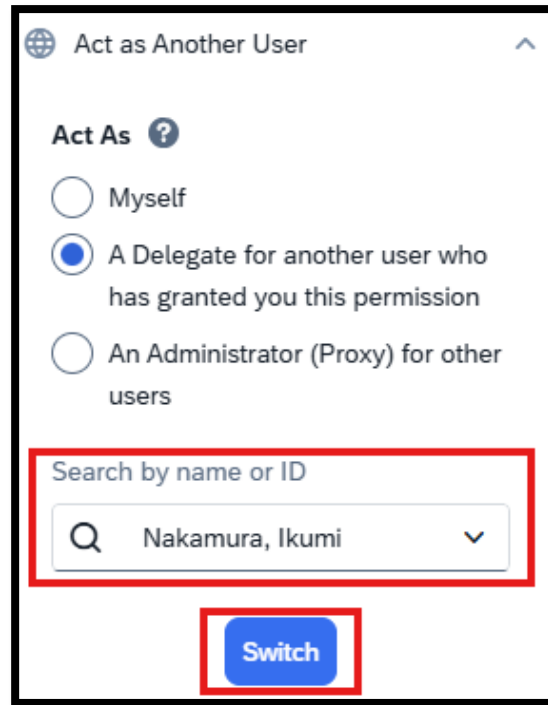
6

Choose **A Delegate for another user** then type in the **traveler's employee ID**.



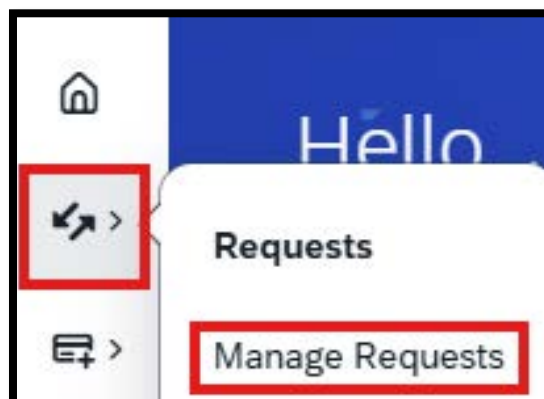
7

Choose the traveler's name, then click **Switch**.



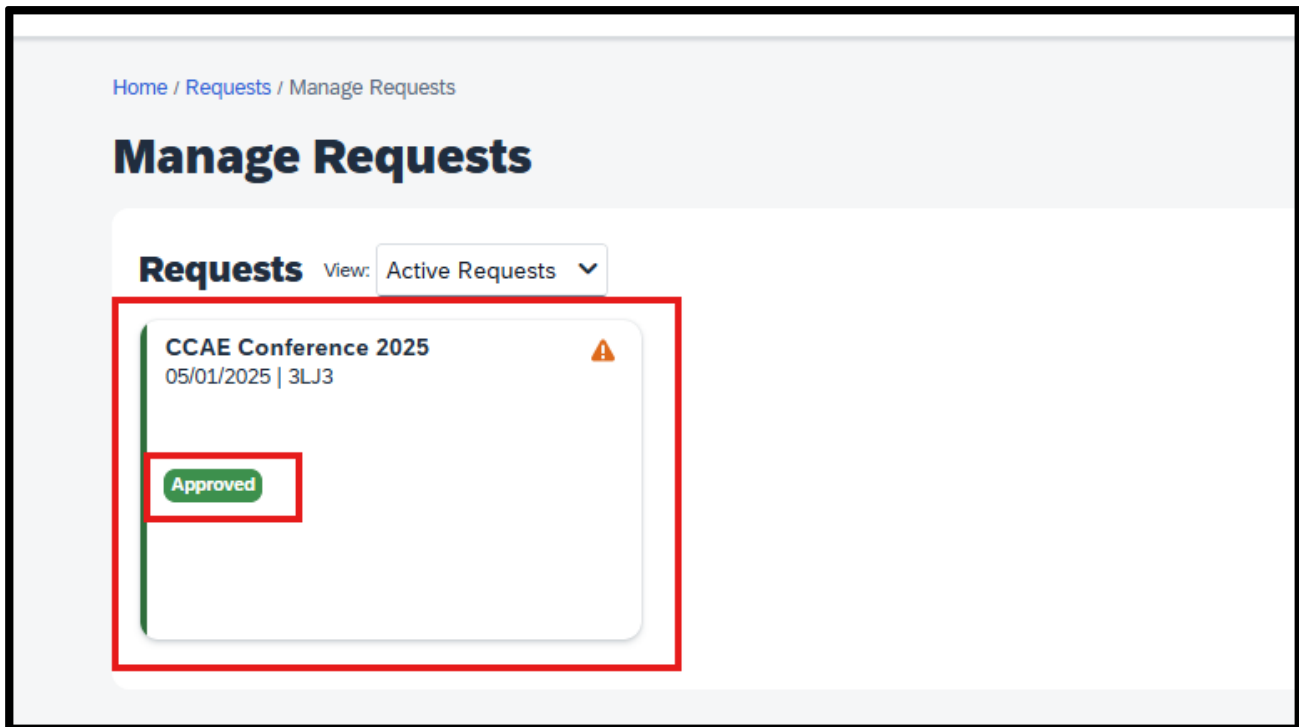
8

You will need to use the **Approved Travel Request** to generate the **Expense Report**. To find the traveler's **Travel Request** select the **Arrow icon** on the left side of the screen & select **Manage Requests**.



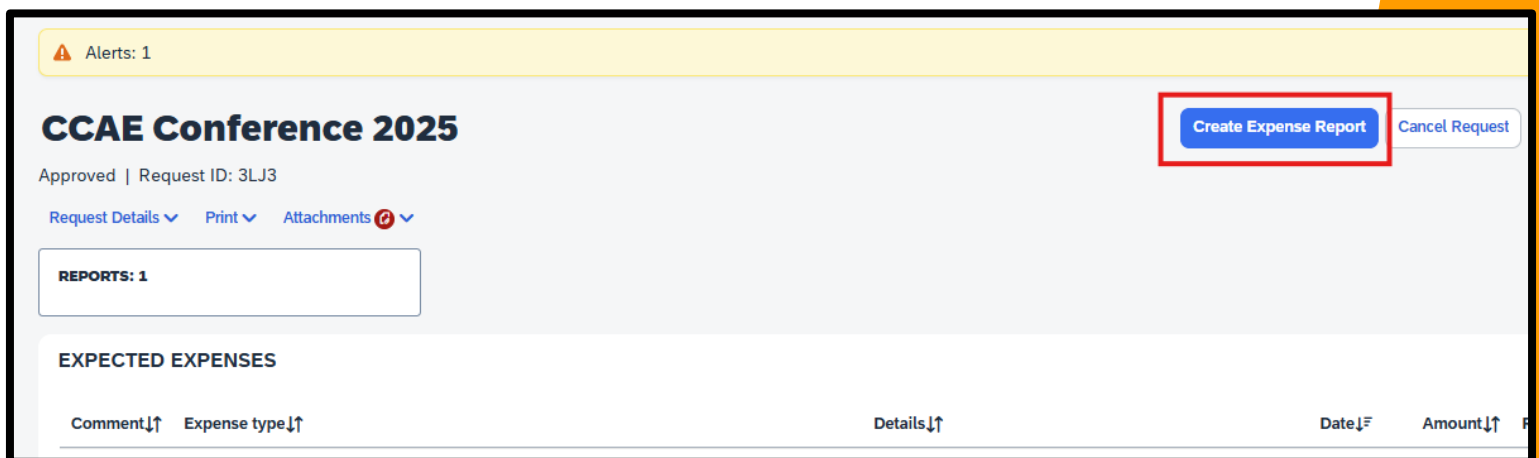
9

Find the traveler's **Approved Travel Request** and open it. If you don't see their request, change the **View** filter from **Active Requests** to **All Requests**.



10

Click **Create Expense Report**.



11

The **expense report** will generate with a six-digit ID number.

Home / Expense / Manage Expenses / CCAE Conference 2025

Alerts: 2

CCAE Conference 2025 \$0.00

Not Submitted | Report Number: NJVGNL

REQUEST
Approved
\$0.00

Report Details ▾ Print/Share ▾ Manage Receipts ▾ View Available Receipts 📄

Expenses ⊕ Add Expense ▾ Edit Delete Copy Allocate Combine Expenses Move ▾

☐	Alerts↑↓	Comment↑↓	Receipt↑↓	Payment Type↑↓	Expense Type↑↓	Vendor Details↑↓	Date↓↑	Requested↑↓	
☐	⚠️	💬	📄	Self-Paid	Conference Fees	California Council Adult Education (CCAЕ)	03/11/2025	\$0.00 Allocated	...
								\$0.00	

12

Edit **each expense** type by clicking **anywhere** in the expense item line. You can also click the **ellipses** > **Edit**.

CCAE Conference 2025 \$0.00

Not Submitted | Report Number: NJVGNL

REQUEST
Approved
\$0.00

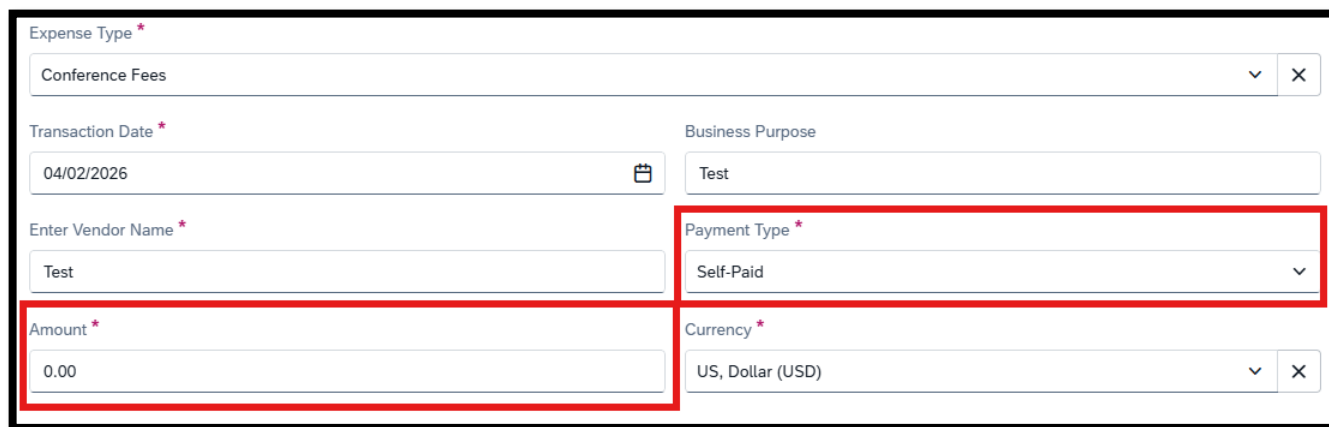
Report Details ▾ Print/Share ▾ Manage Receipts ▾ View Available Receipts 📄

Expenses ⊕ Add Expense ▾ Edit Delete Copy Allocate Combine Expenses Move ▾

☐	Alerts↑↓	Comment↑↓	Receipt↑↓	Payment Type↑↓	Expense Type↑↓	Vendor Details↑↓	Date↓↑	Requested↑↓	
☐	⚠️	💬	📄	Self-Paid	Conference Fees	California Council Adult Education (CCAЕ)	03/11/2025	\$0.00 Allocated	...
								\$0.00	

13

Update the **Payment Type** to the actual payment method used for each expense. Update the **Amount** to reflect the actual costs as well.

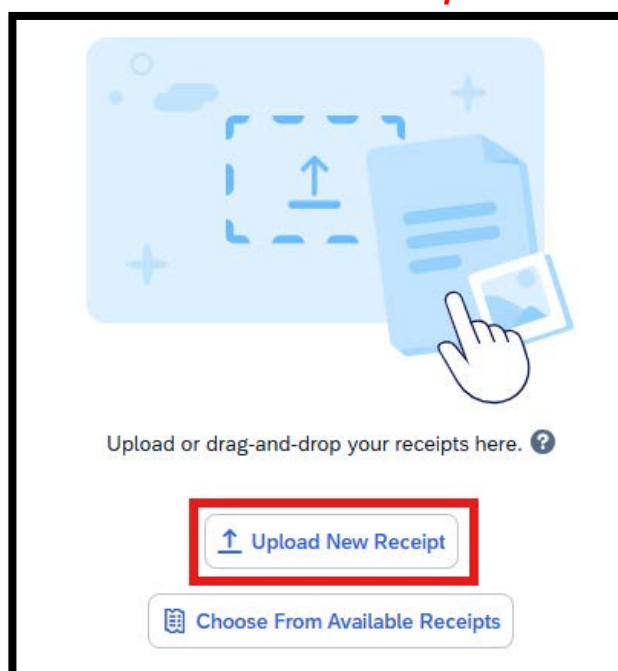


The image shows a form for entering an expense. The fields are as follows:

- Expense Type ***: Conference Fees
- Transaction Date ***: 04/02/2026
- Business Purpose**: Test
- Enter Vendor Name ***: Test
- Payment Type ***: Self-Paid (highlighted with a red box)
- Amount ***: 0.00 (highlighted with a red box)
- Currency ***: US, Dollar (USD)

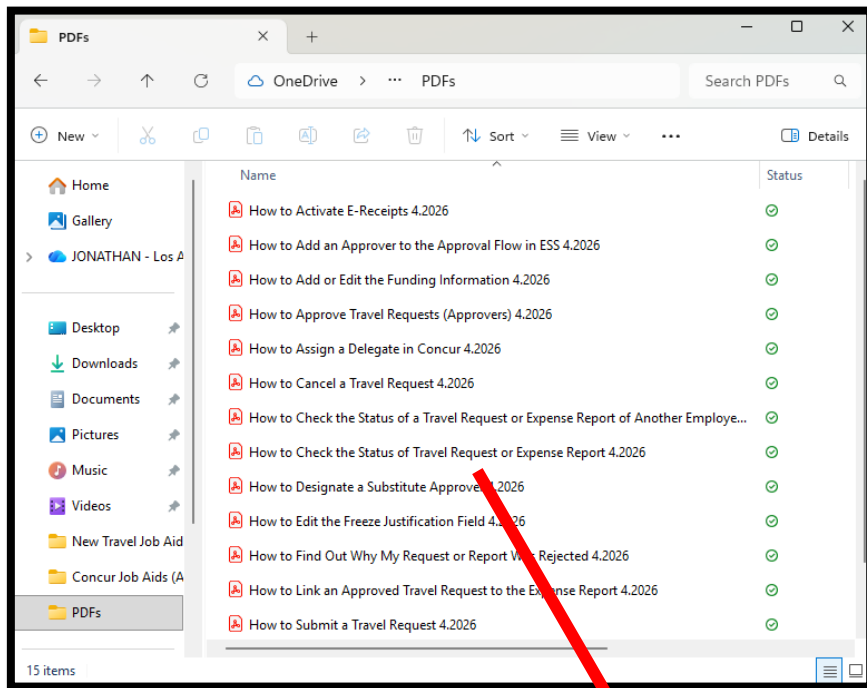
14

Click **Upload New Receipt** to upload the receipt for each expense directly from your desktop. *Alternate method in step 15.*



The image shows a receipt upload interface. It features a large dashed box with an upward arrow and a document icon, indicating where to drop a receipt. Below this, the text reads "Upload or drag-and-drop your receipts here. ?". At the bottom, there are two buttons: "Upload New Receipt" (highlighted with a red box) and "Choose From Available Receipts".

You can also drag & drop your **receipt** directly into the box.



Add a receipt below.

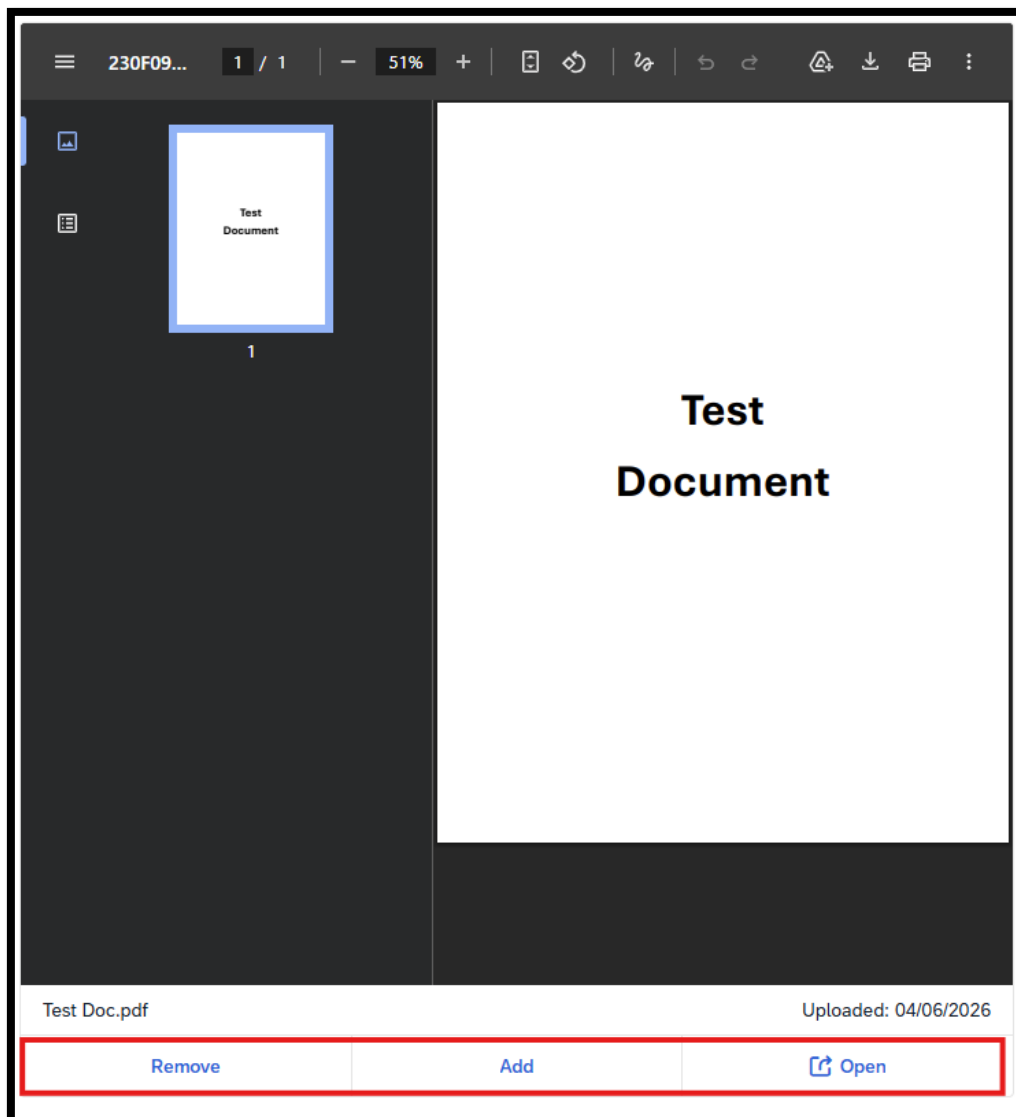


Upload or drag-and-drop your receipts here. ?

[Upload New Receipt](#)

[Choose From Available Receipts](#)

Once a document is attached, you can use the **Remove** button to delete, the **Add** button to attach additional documents or the **Open** button to view those attachments in a separate window. Receipts should contain the last 4 digits on the card used. Bank statements may be attached. For questions on what receipts to use, contact Accounts Payable.



Click **Save Expense.**

18

If the traveler is seeking **mileage reimbursement**, click **Add Expense** → **Manually Create Expense**.

Expenses (1)

+

Add Expense

Edit

Delete

Duplicate

Allocate

Combine Expenses

More

Manually Create Expense

Select from Available Expenses (0)

☐	Alerts	Date	Comment	Receipt	Details	Payment Type	Requested
☐		04/02/2026		Test Document		Self-Paid	\$0.00

\$0.00

19

Search for the expense type by typing **Personal Car Mileage** in the search bar. Select the expense.

The screenshot shows a web interface for creating a new expense. At the top, there are two tabs: 'Create New Expense' (active) and 'Select Available Expenses (0)'. Below the tabs, a label reads 'Select an expense type for the new expense'. A search bar contains the text 'personal' and has a clear 'X' button and a search 'Q' button. Below the search bar, a hint text says 'Search by expense type, category, description'. A category list is shown with an expandable arrow and the text '02. Transportation'. Under this category, the option 'Personal Car Mileage' is highlighted with a red box.

20

The mileage calculator will appear.

A = Worksite Location
B = Conference Location.

The screenshot shows a 'Mileage Calculator' form. It has a title 'Mileage' and a subtitle 'Mileage Calculator'. There are two checkboxes: 'Avoid Tolls' and 'Avoid Highways'. Below these is a section titled 'Waypoints' with a light blue background. This section contains two input fields labeled 'A' and 'B' with green circular icons. A red box highlights these two input fields. To the right of the input fields is a 'Calculate Route' button.

21

To calculate a round trip, click **Make Round Trip**.

Mileage Calculator

☐ Avoid Tolls ☐ Avoid Highways

Waypoints

A 333 South Beaudry Avenue, Los Ang x

B 509 Ninth Ave, San Diego, CA 92101 x

C

121.8 MI
☐ Personal

Calculate Route **Make Round Trip**

22

Click **Add Mileage to Expense**.

Map

121.8 MI
☐ Personal

Calculate Route **Make Round Trip**

2 hours 2 mins
29 mi. About 2 hours 2 mins

24th Floor, Los Angeles, CA 90017, USA

2 mins

East on S Beaudry Ave toward
Marina St 0.3 mi

Onto W 1st St 0.3 mi

Onto N Hope St 0.2 mi

Onto US-101 S 1.4 mi

Onto I-5 S 2.3 mi

Onto I-5 S 26.8 mi

Onto I-5 S 1.2 mi

Onto I-5 S 0.7 mi

Onto I-5 S 73.0 mi

TOTAL PERSONAL 0.0 MI TOTAL BUSINESS 121.8 MI

Add Mileage to Expense Cancel

23

For **Mileage Type**, select **Travel Mileage**.

Required field *

Expense Type *

Personal Car Mileage

Transaction Date *

04/02/2026

To Location

509 Ninth Ave, San Diego, CA 92101, USA

Distance *

Mileage Type *

Search by Text

Non-Travel Mileage

Travel Mileage

24

Click **Save Expense**.

New Expense

Details Itemizations

Mileage Calculator Allocate

Required field *

Expense Type *

Personal Car Mileage

Transaction Date *

04/02/2026

Mileage Type *

Travel Mileage

Business Purpose *

Test

From Location

333 South Beaudry Avenue, Los Angeles, CA 90017, US

To Location

509 Ninth Ave, San Diego, CA 92101, USA

Payment Type

Self-Paid

Distance *

122

Amount *

88.45

Currency

US, Dollar (USD)

Reimbursement Rates

USD 0.725 per mile

Save Expense

View Receipt

The funding cost center auto-defaults to the traveler's job assignment cost center.

To check and update the **funding cost center**, select all the checkboxes next to the expenses and then click **Allocate**.

Your Department or school provides the funding line, not the Travel Desk.

CCAIE Conference 2025 \$201.20

Not Submitted | Report Number: NJVGNL

Submit Report Delete Report

REQUEST
Approved
\$0.00

Report Details Print/Share Manage Receipts View Available Receipts

Expenses

☒
☒
☒

Comment Receipt Payment Type Expense Type Vendor Details Date Requested

		Self-Paid	Personal Car Mileage		05/23/2025	\$151.20 Allocated	...
		*LAUSD District Paid-P-Card, PO, Imprest	Conference Fees	California Council Adult Education (CCAIE)	03/11/2025	\$50.00 Allocated	...
						\$201.20	

Add Expense Edit Delete Copy Allocate Combine Expenses Move

26

In the **Allocations** window, checkoff the checkbox on the left of the line & click **Edit**.

Allocate

Expenses: 2 | \$201.20

Percent Amount

Amount \$201.20 Allocated 100% \$201.20 Remaining 0% \$0.00

Default Allocation

Code Default

Amount USD \$0.00

Allocations (1)

Add Edit Remove Save as Favorite

	Logical System↓↑	Company Code↓↑	Cost Object Type↓↑	Cost Object Value↓↑	Fund↓↑	Functional Area↓↑	Code↑↓	Amount USD
☒	ECC Production Client	LAUSD	Cost Center	N Valley Occupational Ctr	AE-Adult Educ Prog	Adult Ed-Dist Adm-Other-S	PR1910-1000-CC-1932901-110-6391-4110-2100-14070	201.20

27

Scroll down to the last three fields (**Cost Object Value**, **Fund**, and **Functional Area**).

Add Allocation

+ New Allocation ★ Favorite Allocations

(CC) Cost Center X v

Cost Object Value 4

(1050901) Contract Admin and Procurement Services X v

Fund v

Functional Area v

Save Cancel

28

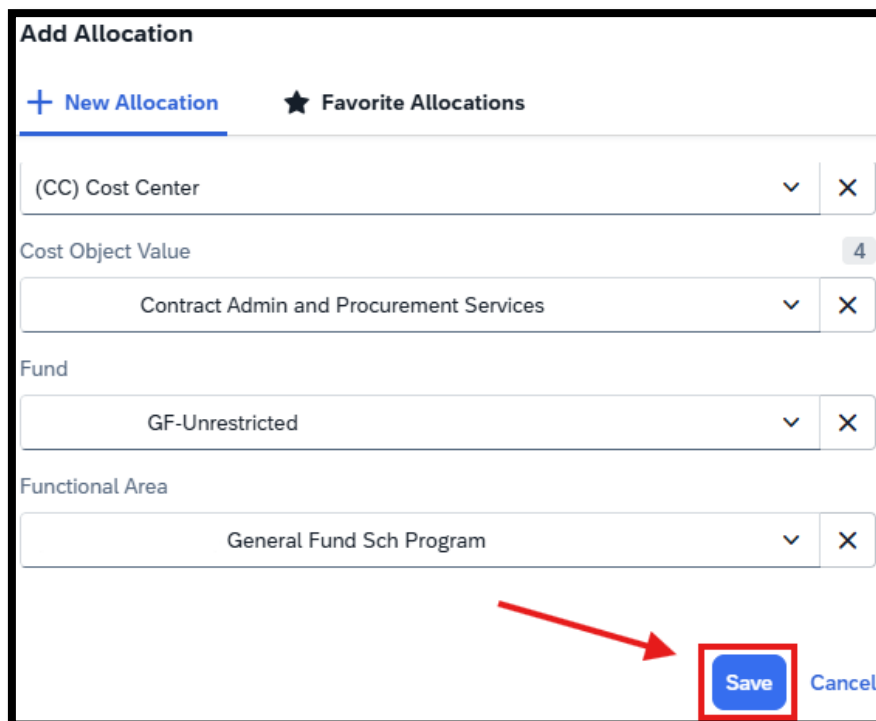
If needed, update the funding cost center under **Cost Object Value**. Then, **if needed**, update the **Fund** and **Functional Area**.



The screenshot shows a form titled "Cost Object Value" with a small "4" in the top right corner. It contains three dropdown menus, each with a "v" icon and a close "X" button. The first dropdown is labeled "Cost Object Value" and shows "Contract Admin and Procurement Services". The second dropdown is labeled "Fund" and shows "GF-Unrestricted". The third dropdown is labeled "Functional Area" and shows "General Fund Sch Program".

29

Click **Save**.



The screenshot shows a form titled "Add Allocation" with two tabs: "+ New Allocation" and "★ Favorite Allocations". It contains four dropdown menus, each with a "v" icon and a close "X" button. The first dropdown is labeled "(CC) Cost Center" and is empty. The second dropdown is labeled "Cost Object Value" with a small "4" in the top right corner and shows "Contract Admin and Procurement Services". The third dropdown is labeled "Fund" and shows "GF-Unrestricted". The fourth dropdown is labeled "Functional Area" and shows "General Fund Sch Program". At the bottom right, there is a blue "Save" button and a "Cancel" button. A red arrow points to the "Save" button.

Click **Save** again in the **Allocations** window.

PercentAmount

Amount
\$1,080.35Allocated \$1,080.35
100%Remaining \$0.00
0%

Default Allocation
Code
DefaultPercent %
0

Allocations (1)

AddEditRemoveSave as Favorite

	Logical System↑↓	Company Code↑↓	Cost Object Type↑↓	Cost Object Value↑↓	Fund	Percent %
☐	ECC Production Client	LAUSD	Cost Center	Contract Admin and Procurement Services	GF-Unres	100...

SaveCancel

Ensure all expenses are accounted for. When ready, click **Submit Report**.

Home / Expense / Manage Expenses / CCAE Conference 2025

CCAConference 2025 \$201.20

Submit ReportDelete Report

Not Submitted | Report Number: NJVGNL

REQUEST
Approved
\$0.00

Report Details▼Print/Share▼Manage Receipts▼View Available Receipts📄

Expenses

Add Expense▼EditDeleteCopyAllocateCombine ExpensesMove▼

☒	Comment↑↓	Receipt↑↓	Payment Type↑↓	Expense Type↑↓	Vendor Details↑↓	Date↑↓	Requested↑↓
☒			Self-Paid	Personal Car Mileage		05/23/2025	\$151.20 Allocated...
☒			*LAUSD District Paid-P-Card, PO, Imprest	Conference Fees	California Council Adult Education (CCA)	03/11/2025	\$50.00 Allocated...
							\$201.20

32

Yellow Warning sign will not prohibit you from submitting the report.

Home / Requests / Manage Requests / TESTING

Alerts: 1

EXPENSE	Hotel	07/17/2025	\$900.00
---------	-------	------------	----------

 **Warning:** Hotel expenses are not to exceed \$300 per night, including related taxes and fees. [View](#)

TESTING \$1,080.70

Not Submitted | Request ID: 3JJW

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

[Submit Request](#) [Delete Request](#)

 **Warning:** Hotel expenses are not to exceed \$300 per night, including related taxes and fees. [View](#)

33

Red Error message will prohibit you from submitting the report. You will need to correct the error before submitting the report.

Alerts: 7

EXPENSE	Personal Car Mileage	02/05/2025	\$0.70
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 **Error:** This transaction has not been allocated. Please click on the 'Allocate' button and add request allocation. [View](#)

 **Error:** This transaction has not been allocated. Please click on the 'Allocate' button and add request allocation. [View](#)

If the **report** goes through **budget check** successfully, the system will indicate who the report is **pending with**. Budget check should take 2-5 minutes. Go to **Report Details → Edit Report Header**.

If the report fails **budget check**, the report will be rejected (sent back to the traveler).

Not Submitted | Report Number: O368II

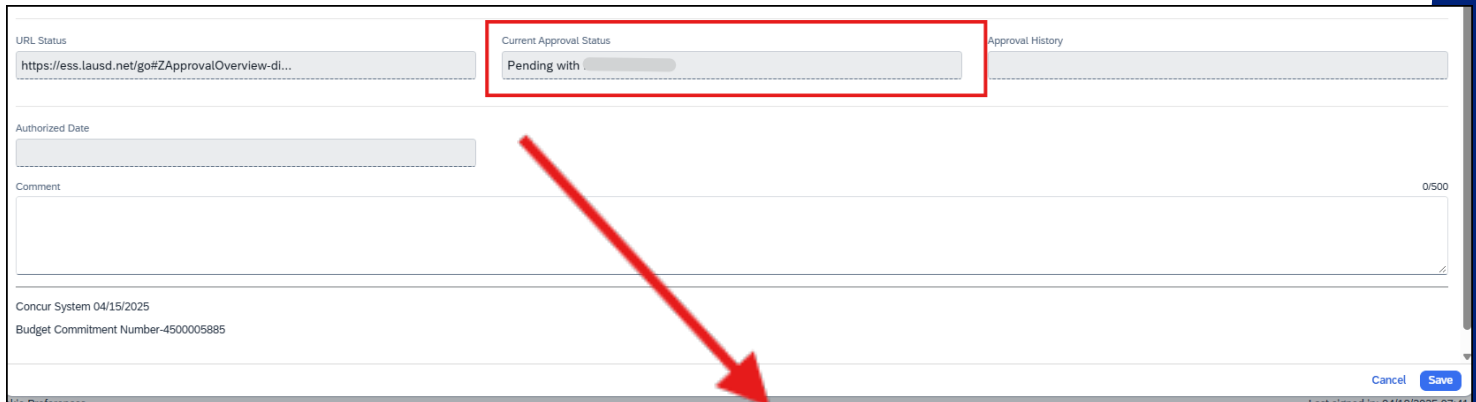
Report Details ▾ Print/Share ▾ Manage Receipts ▾

Report

- Report Header
- Report Totals
- Report Timeline
- Audit Trail
- Allocation Summary
- Linked Add-ons
- Manage Requests

Comment↓↑	Receipt↓↑	Payment Type↓↑	Expense Type↓↑	Ver
		Self-Paid	Per Diem	
		Self-Paid	Conference Fees	TE

Scroll down to **Current Approval Status**. It will state the name of the approver.



The screenshot shows a web application interface for approval management. At the top, there are three tabs: 'URL Status', 'Current Approval Status', and 'Approval History'. The 'Current Approval Status' tab is selected and highlighted with a red rectangular box. Below the tabs, there are several input fields: 'Authorized Date', 'Comment' (with a character count of 0/500), and a footer area containing 'Concur System 04/15/2025' and 'Budget Commitment Number-4500005885'. A red arrow points from the 'Current Approval Status' field to a callout box on the right.

URL Status	Current Approval Status	Approval History
https://ess.lausd.net/go#ZApprovalOverview-di...	Pending with [redacted]	

Authorized Date: [redacted]

Comment: [redacted] 0/500

Concur System 04/15/2025
Budget Commitment Number-4500005885

Cancel Save

Current Approval Status

Pending with [redacted]