SAP Concur

PROCUREMENT SERVICES DIVISION

End-USER Training

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

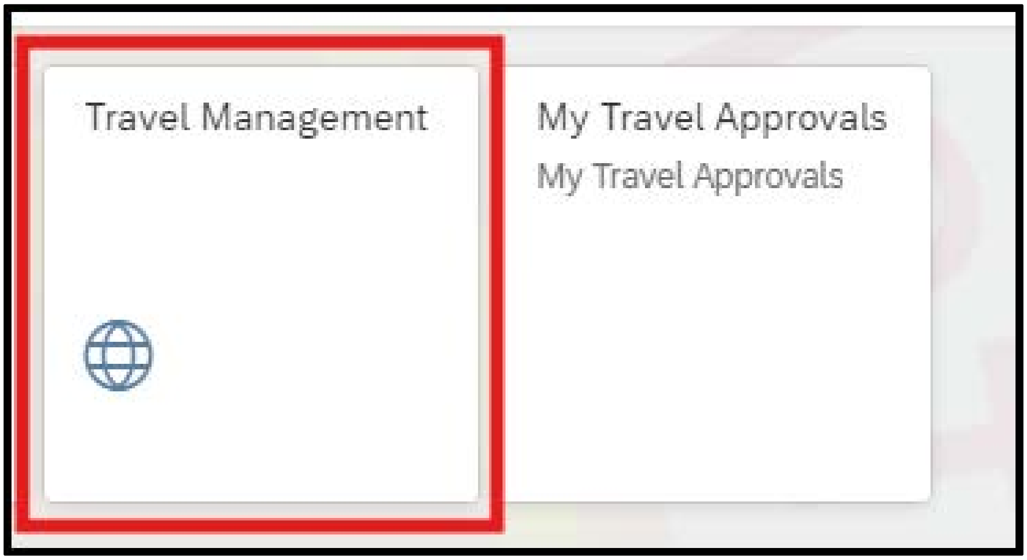
The purpose of this job aid is to show Site Travel Specialists on how to submit a travel expense report on behalf of another employee

1

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

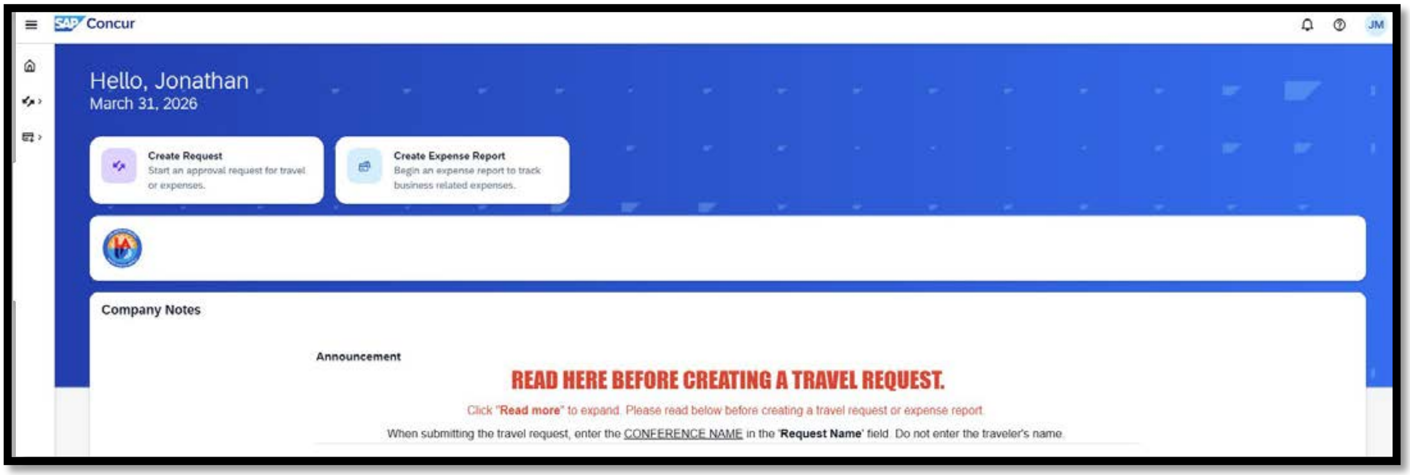
2

Click on the **Travel Management** tile.



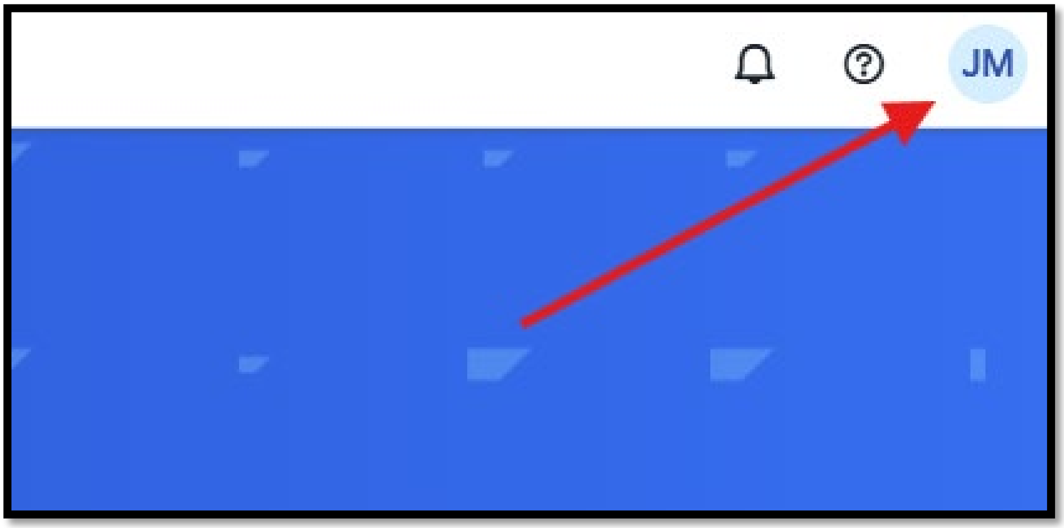
3

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



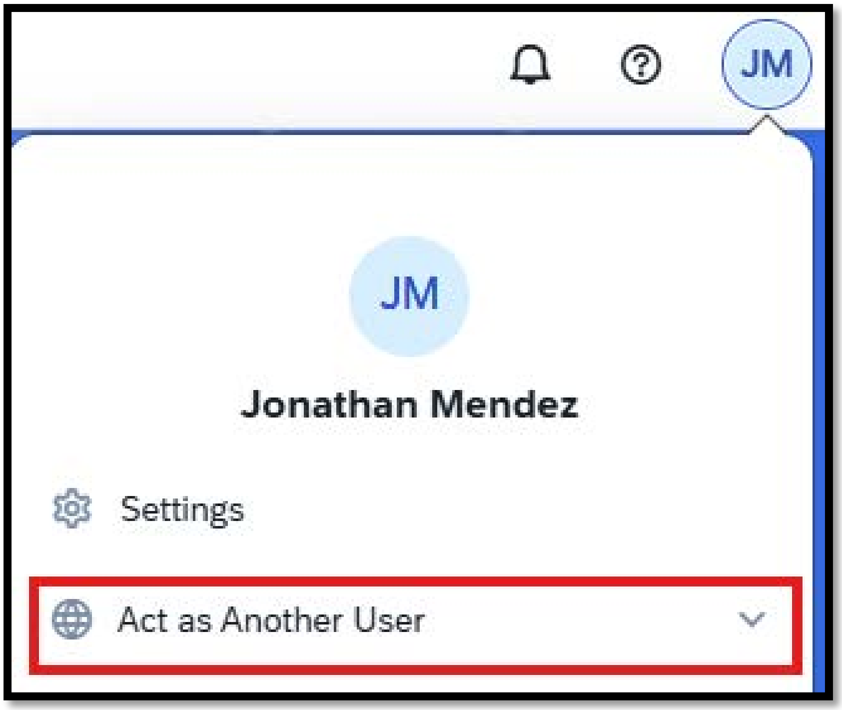
4

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



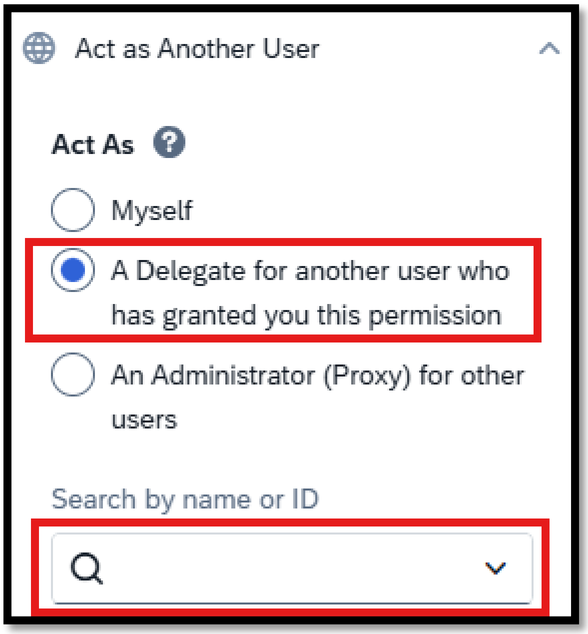
5

Click **Act as Another User**.



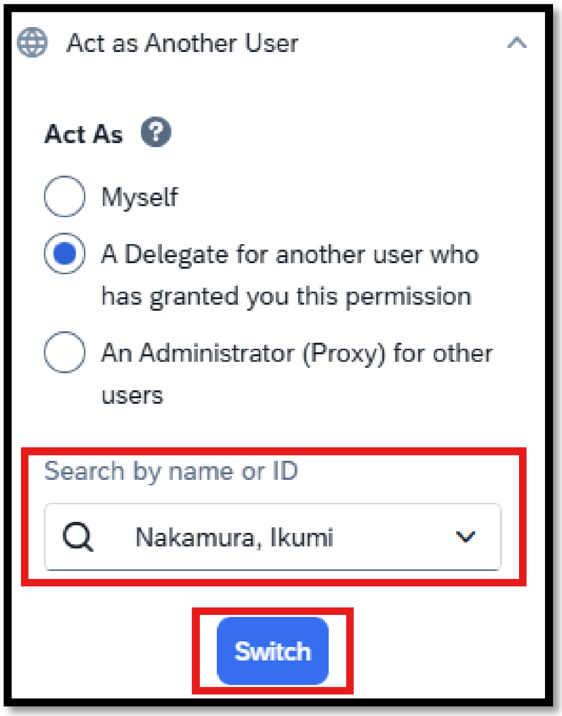
6

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



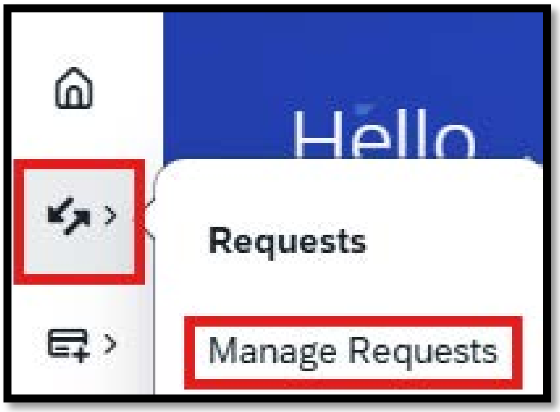
7

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



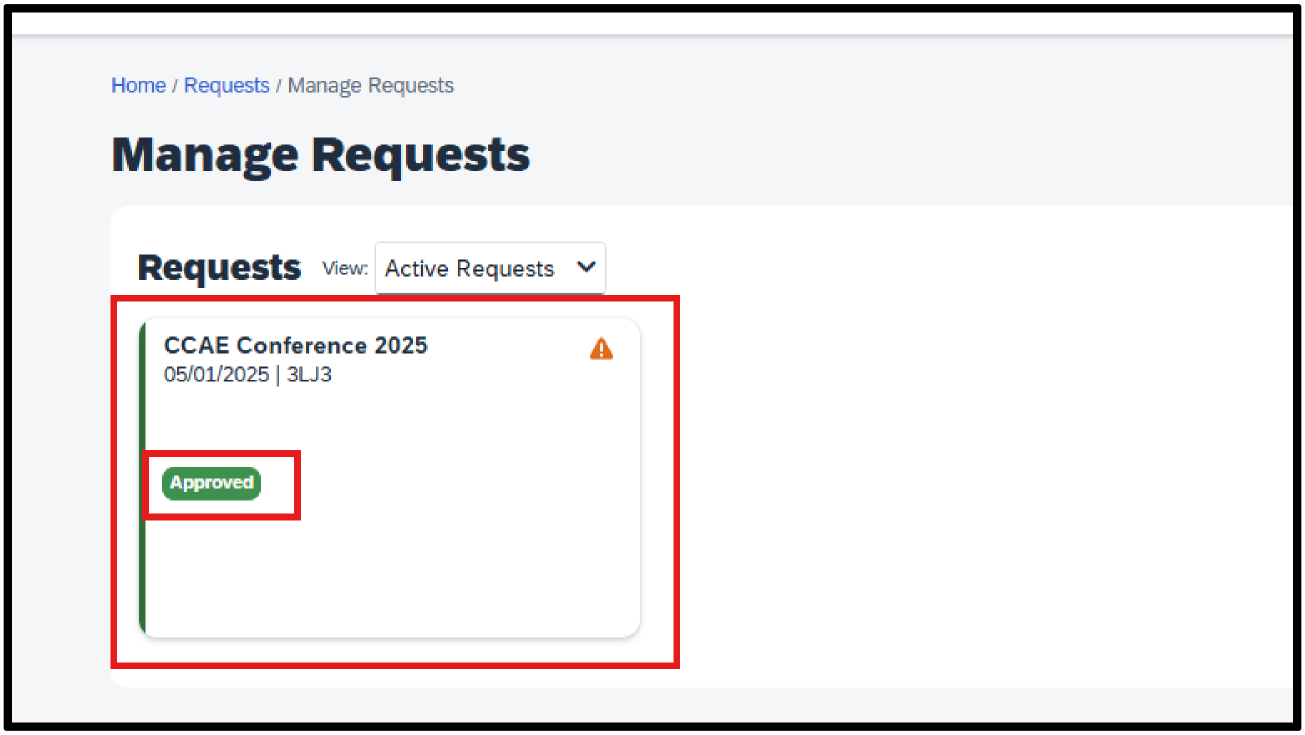
8

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.**



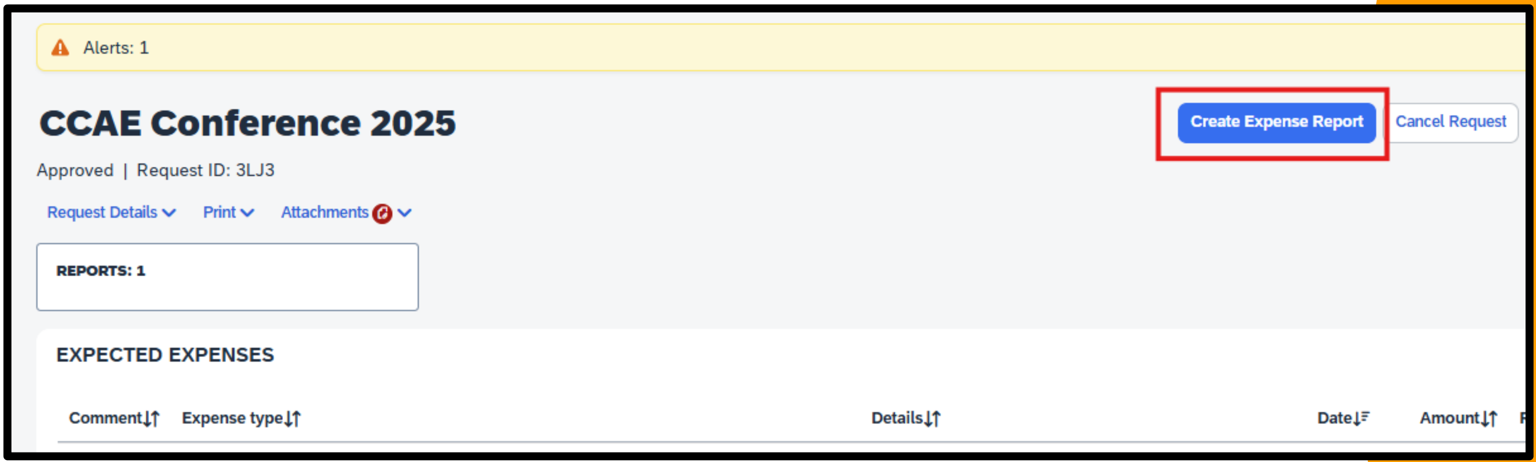
9

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**.



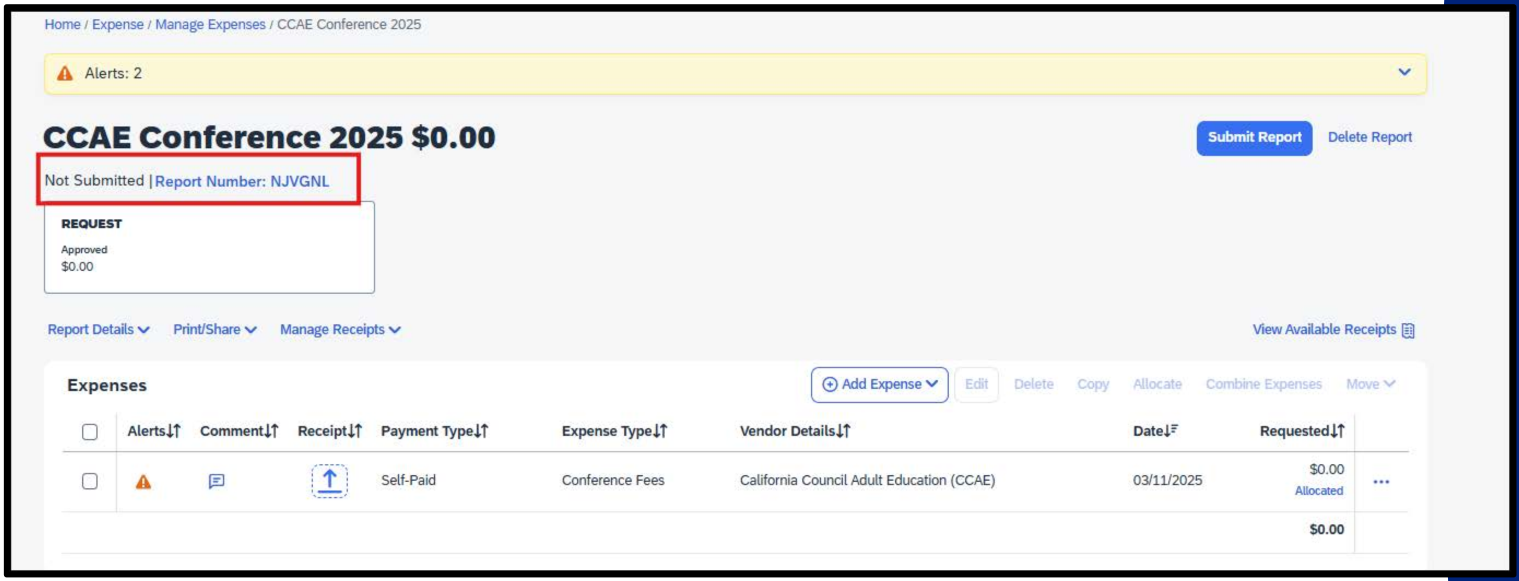
10

Click **Create Expense Report**.



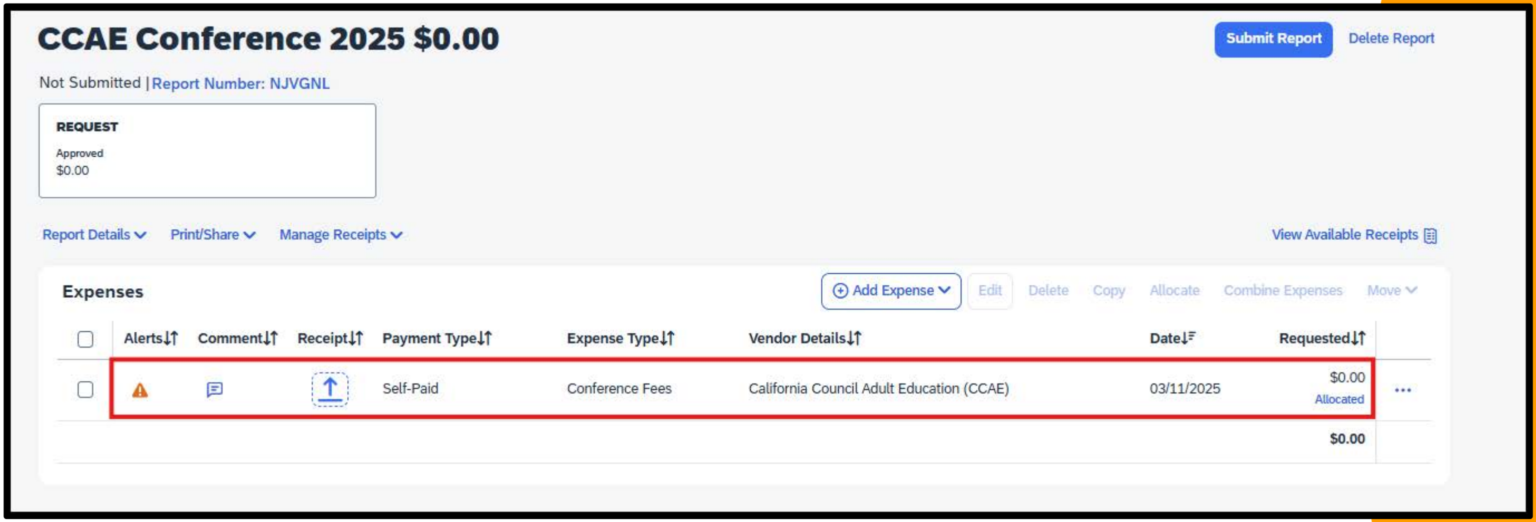
11

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



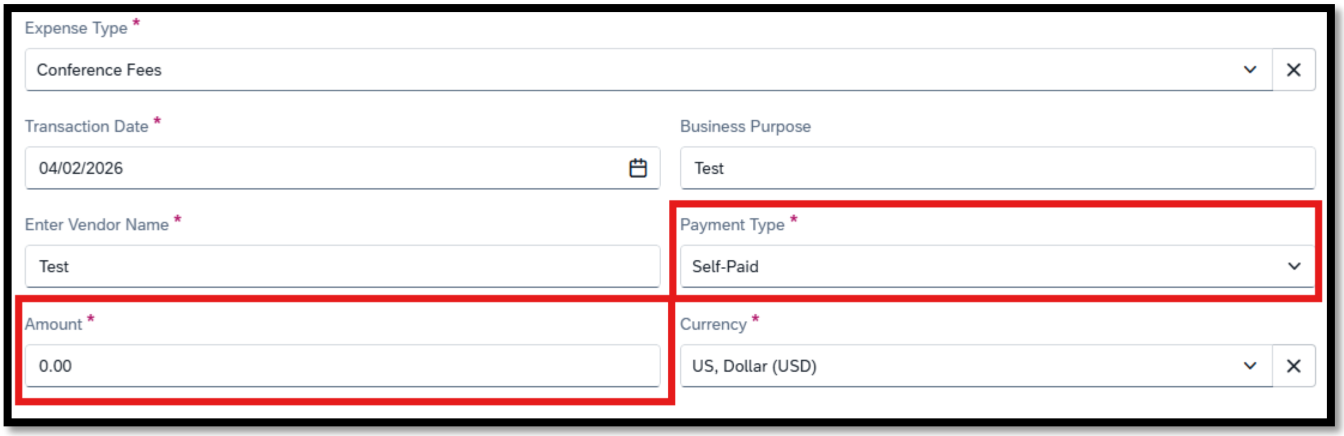
12

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



13

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



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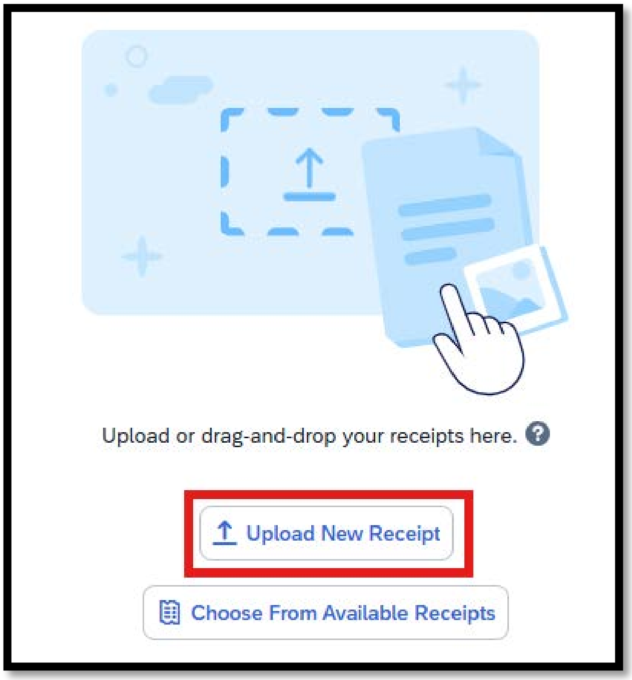
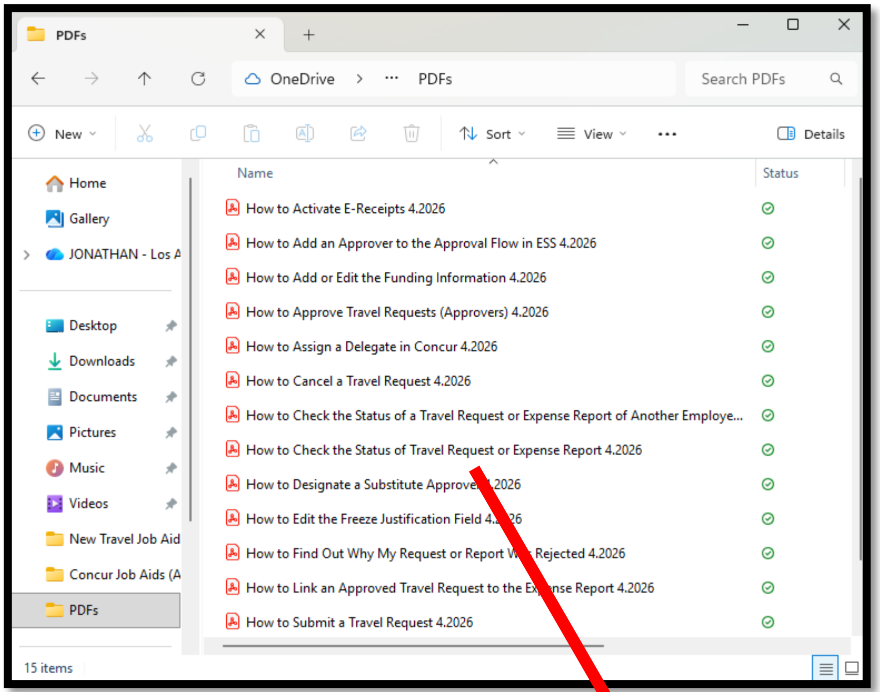
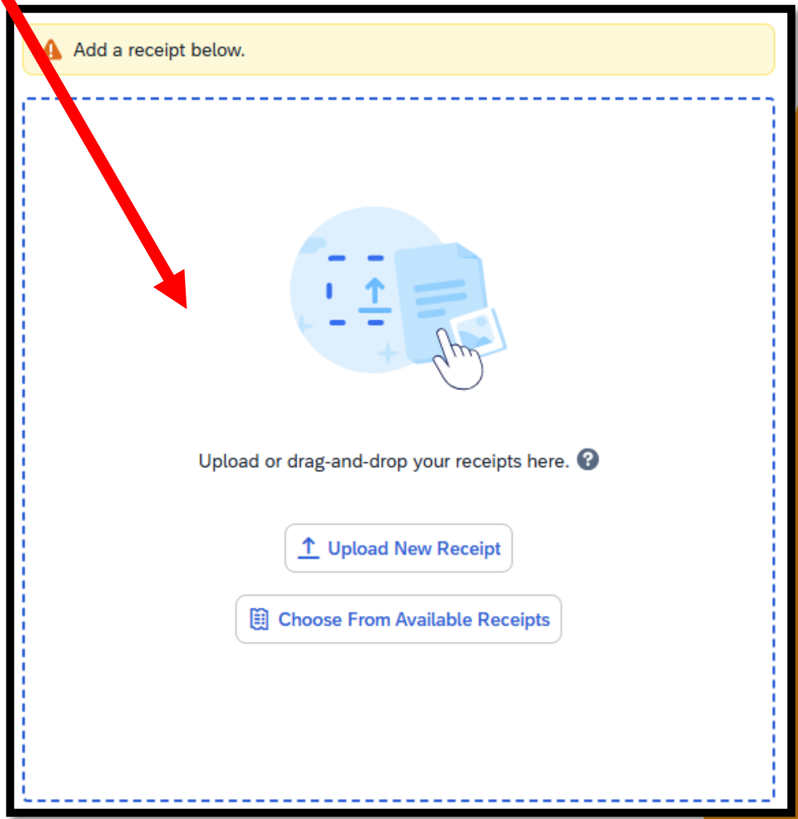
Click **Upload New Receipt** to upload the receipt for each expense directly from your desktop. *Alternate method in step 15.*



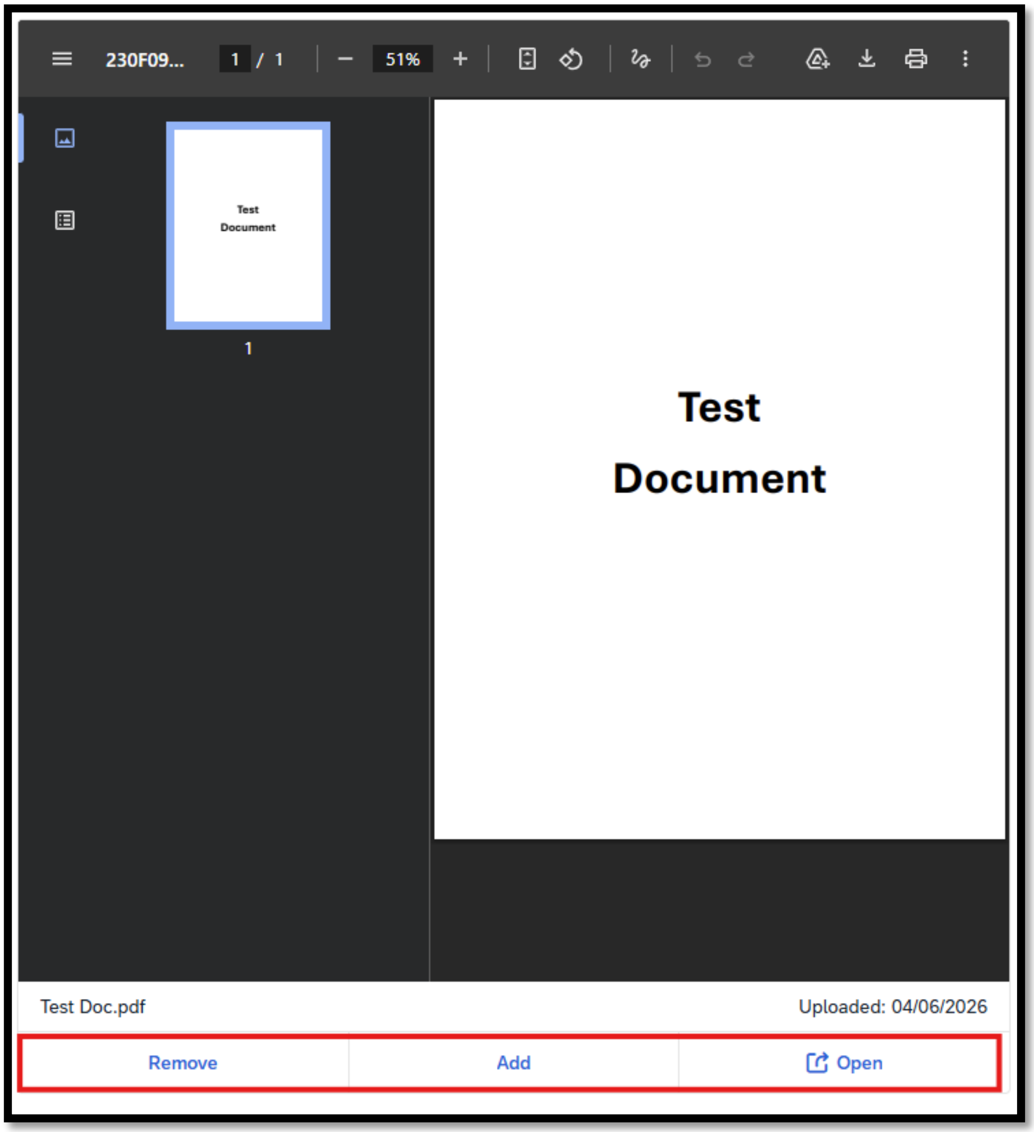
15

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





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.



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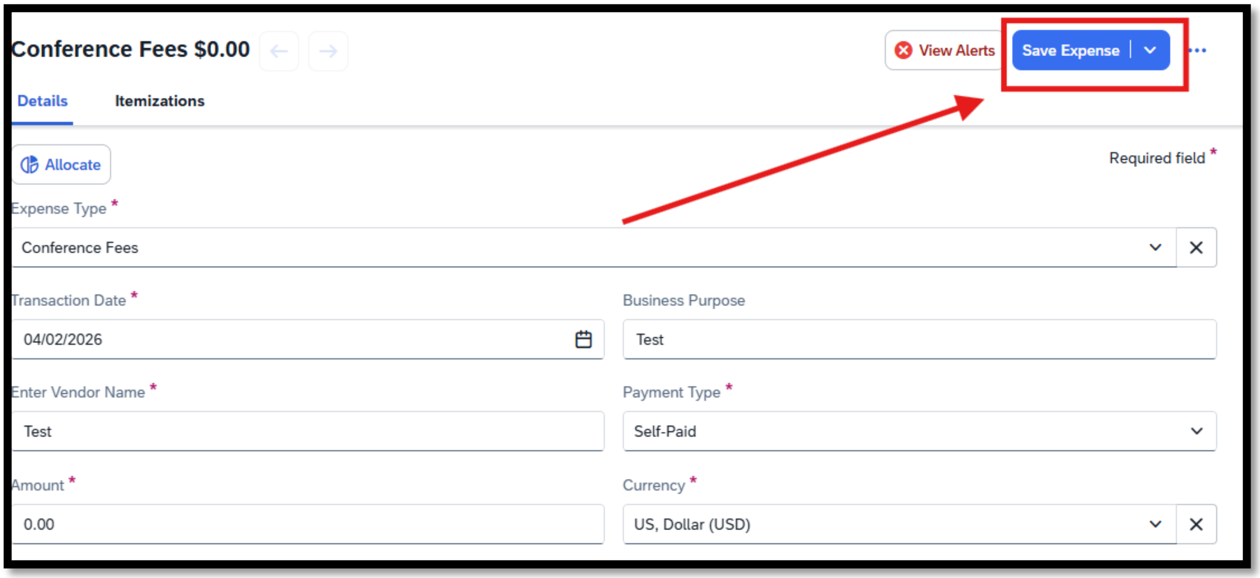
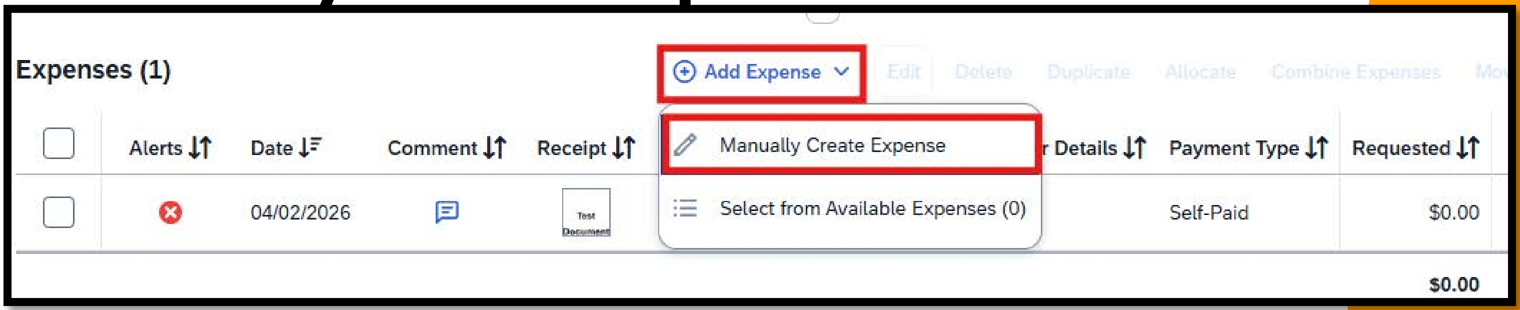
Click **Save Expense**.



18

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



19

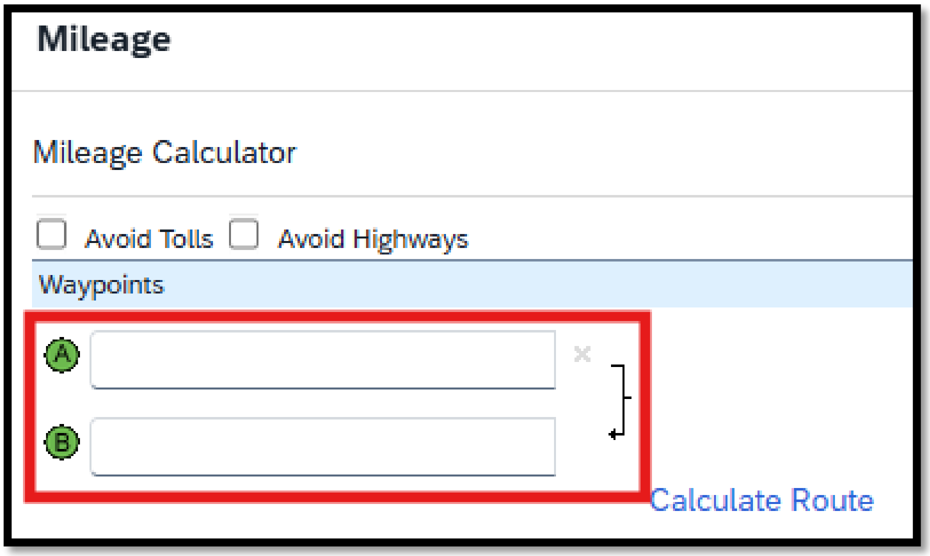
Search for the expense type by typing **Personal Car Mileage** in the search bar. Select the expense**.**

20

The mileage calculator will appear.

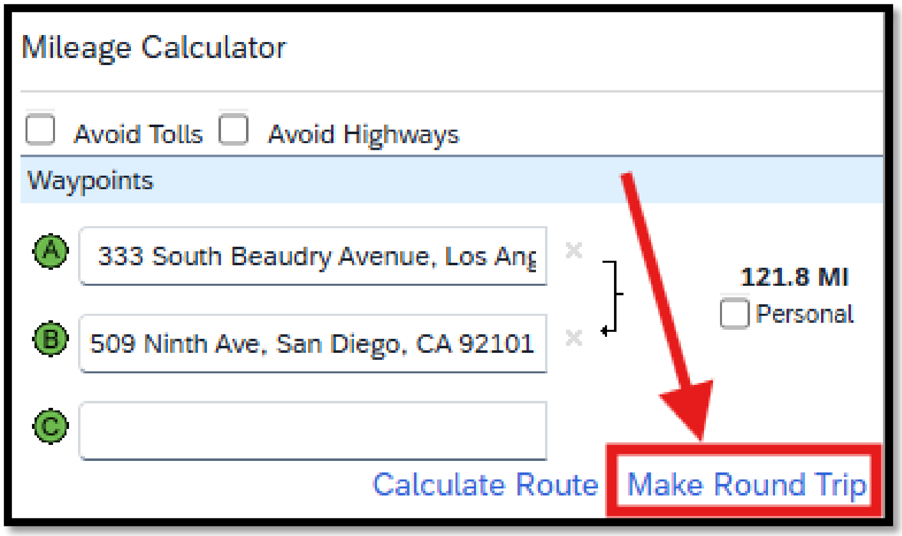
A = Worksite Location

B= Conference Location.



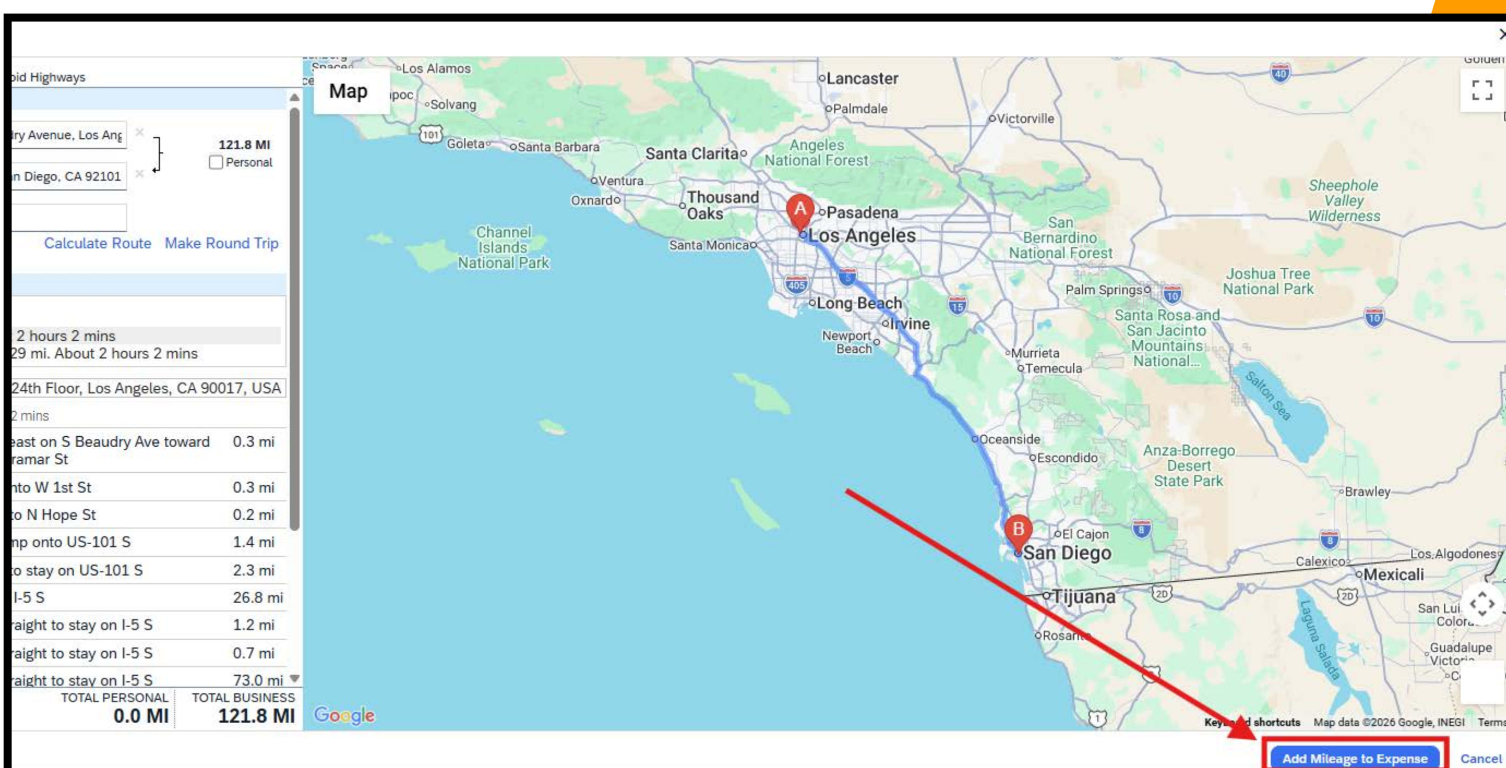
21

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



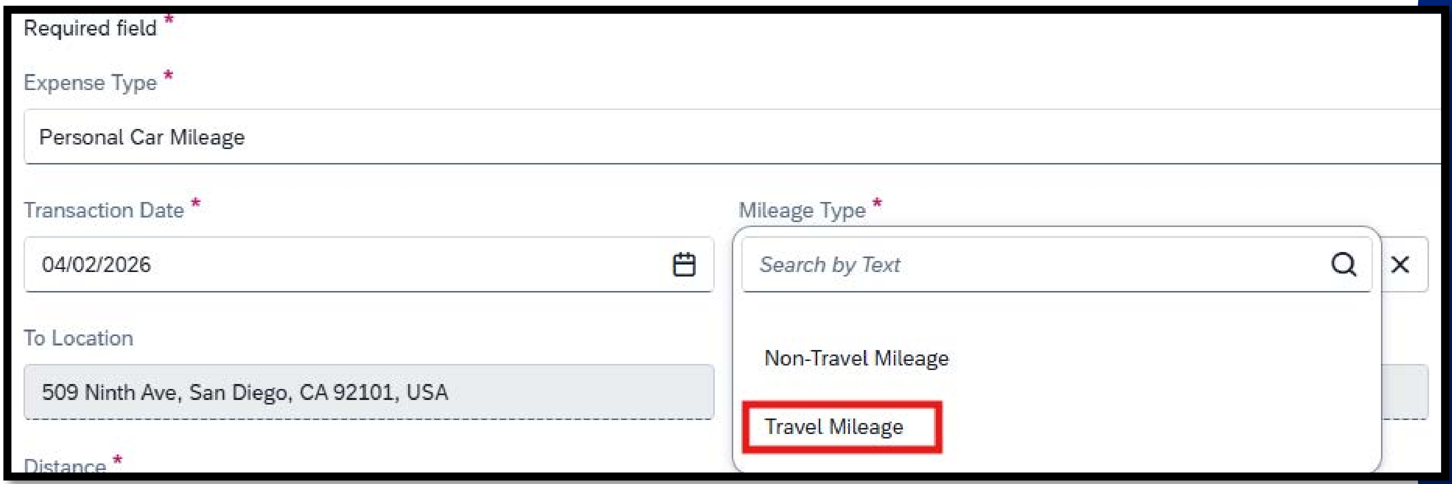
22

Click **Add Mileage to Expense**.



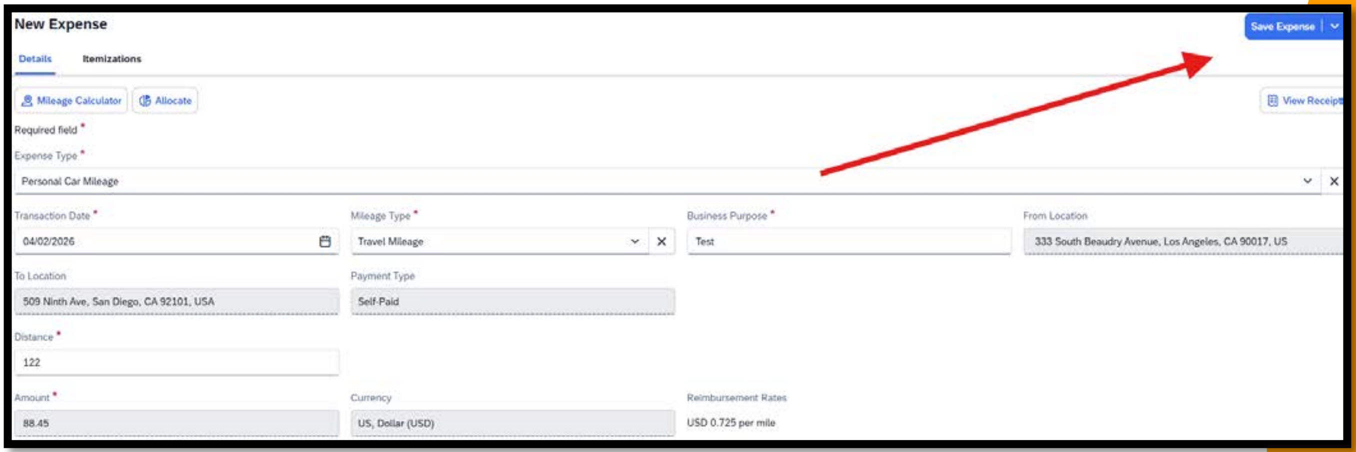
23

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



24

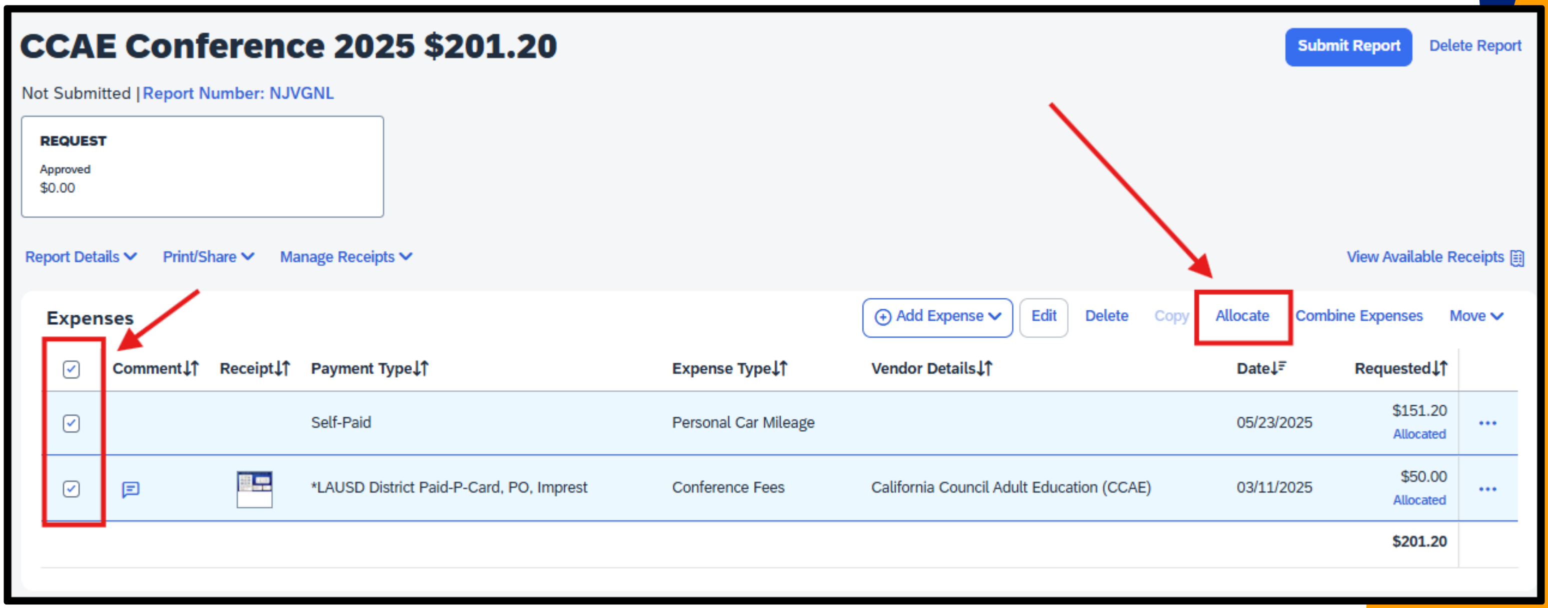
Click **Save Expense**.



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.



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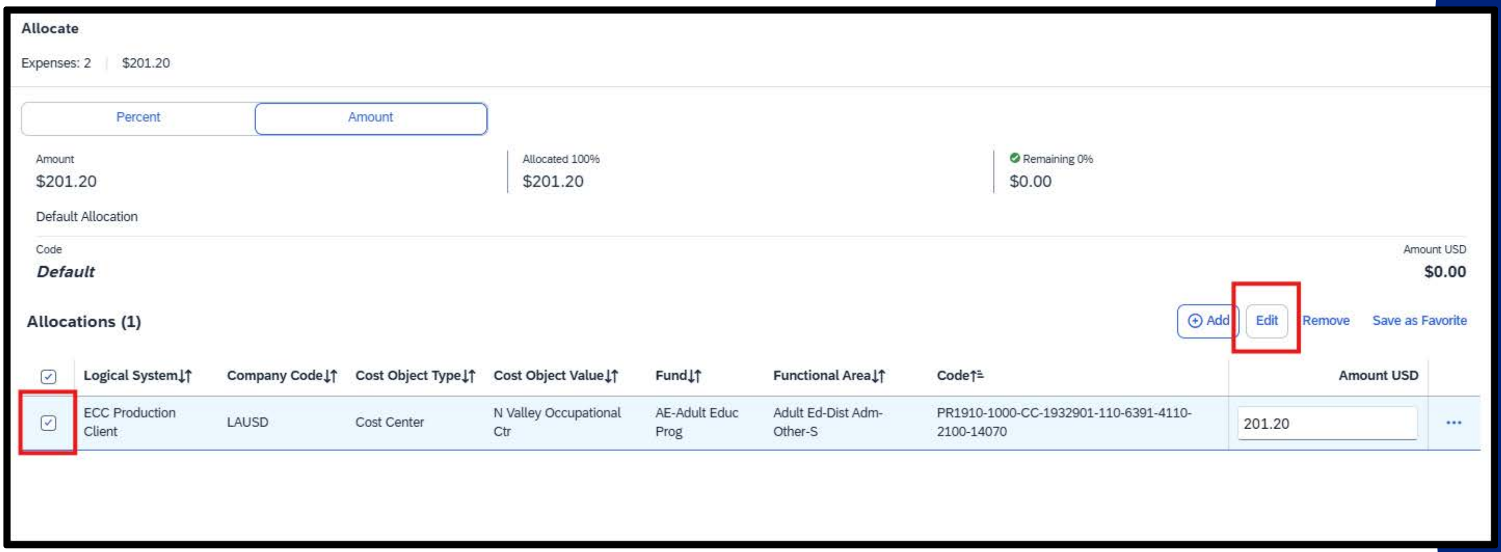
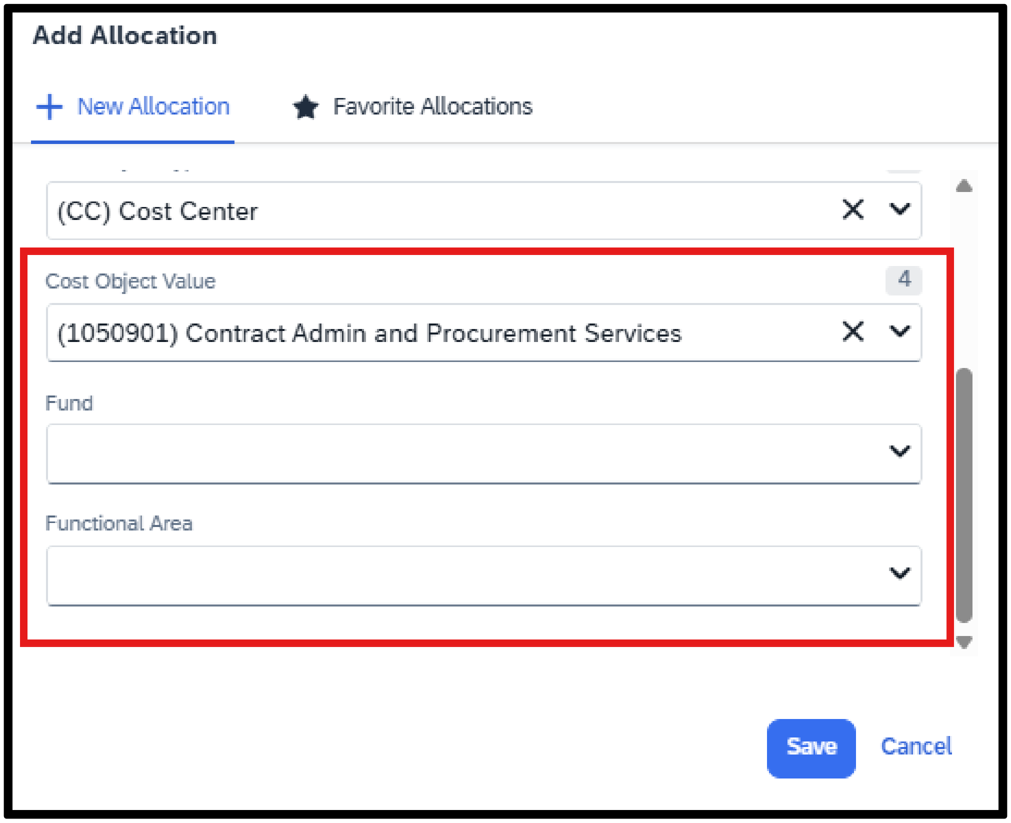
In the **Allocations** window, checkoff the checkbox on the left of the line & click **Edit**.



27

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



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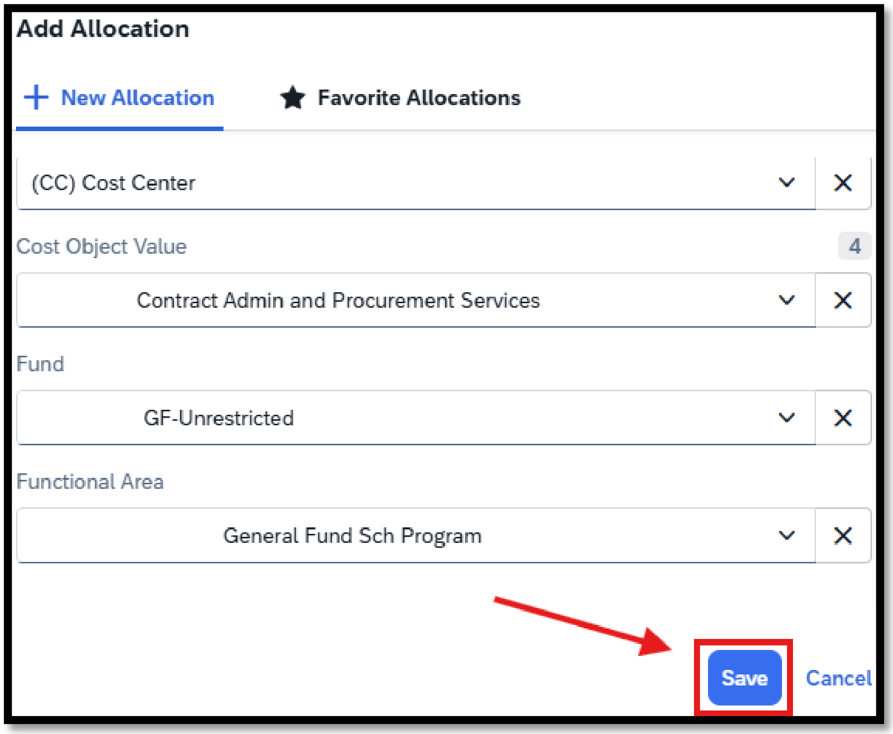
If needed, update the funding cost center under **Cost Object Value**. Then, **if needed**, update the **Fund** and **Functional Area.**

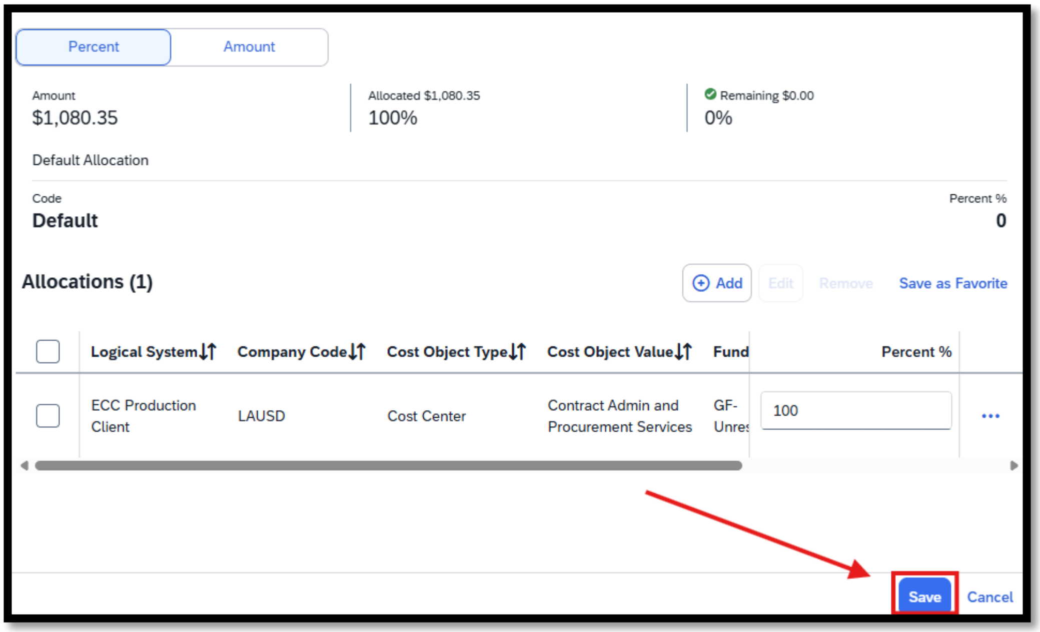
29

Click **Save**.



30

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



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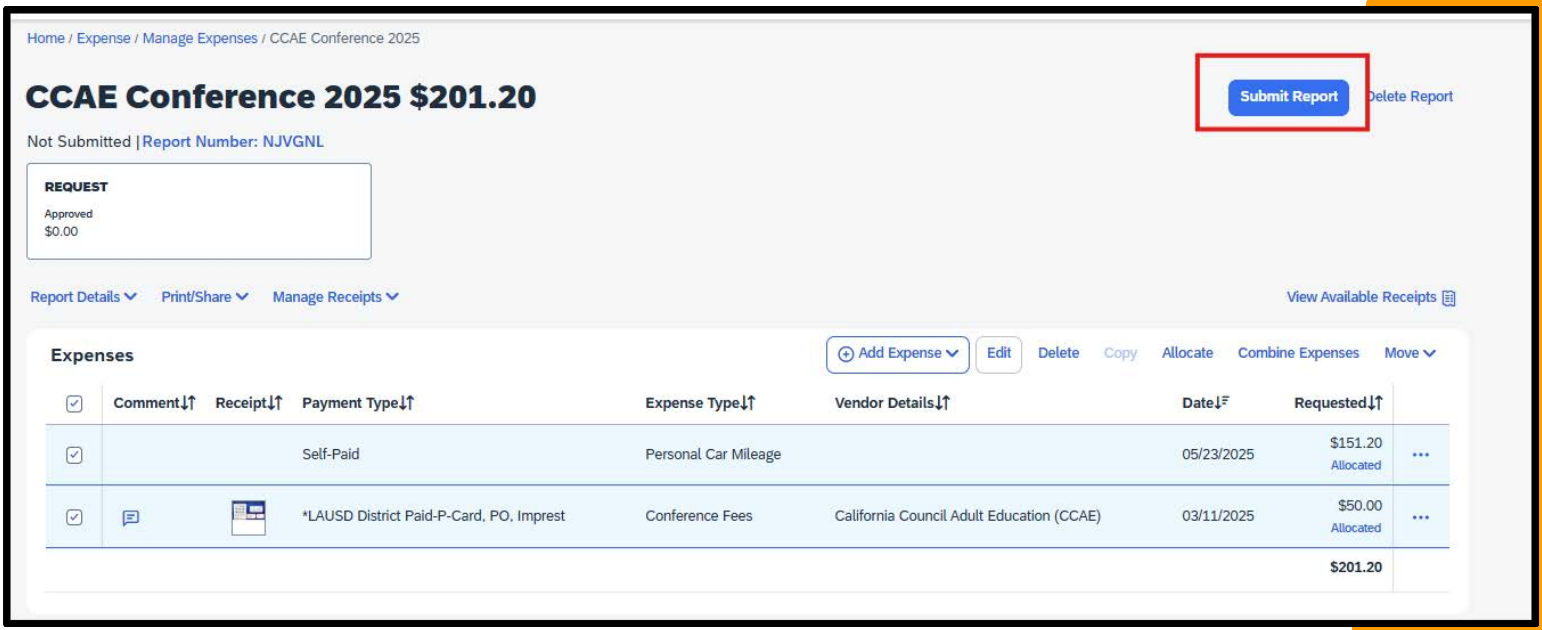
Ensure all expenses are accounted for. When ready, click **Submit Report**.



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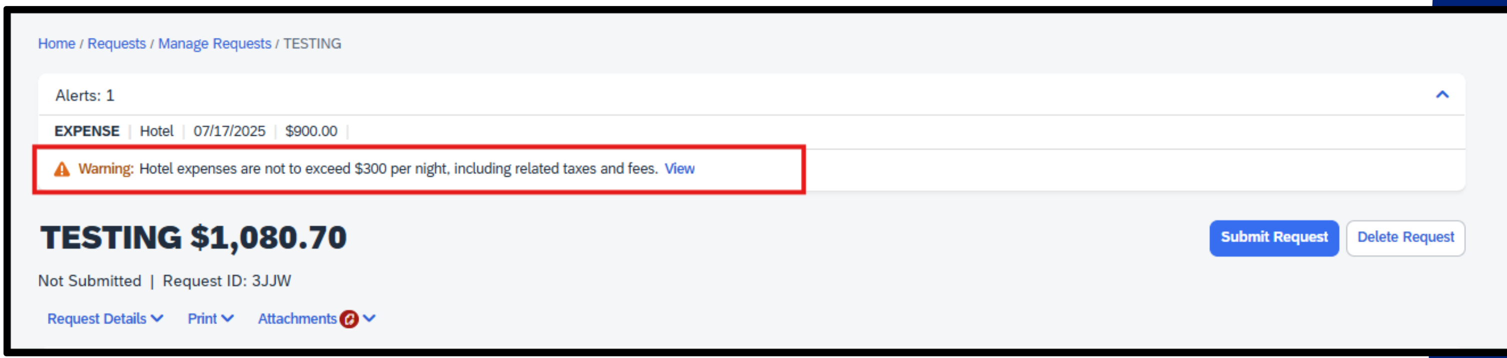
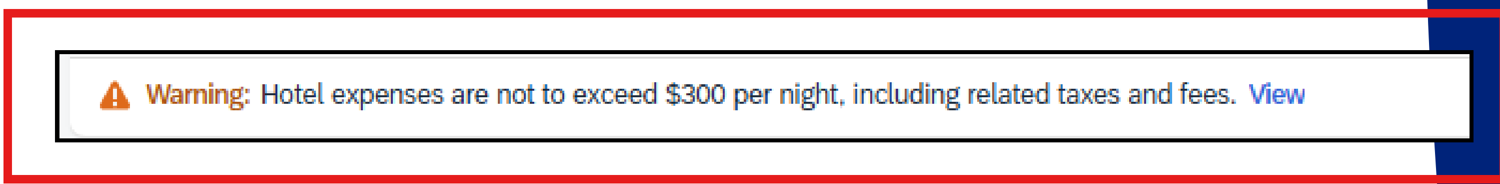
Yellow Warning sign will <u>not</u> prohibit you from submitting the report.





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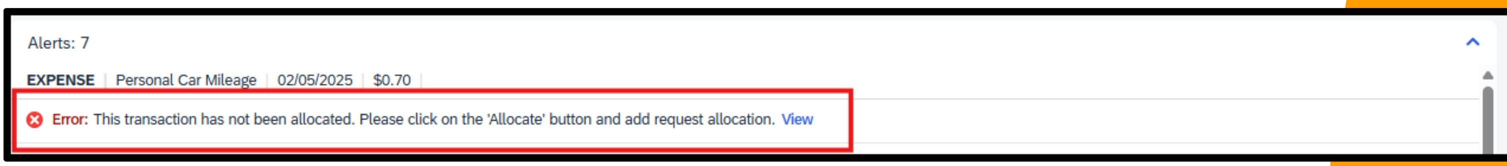
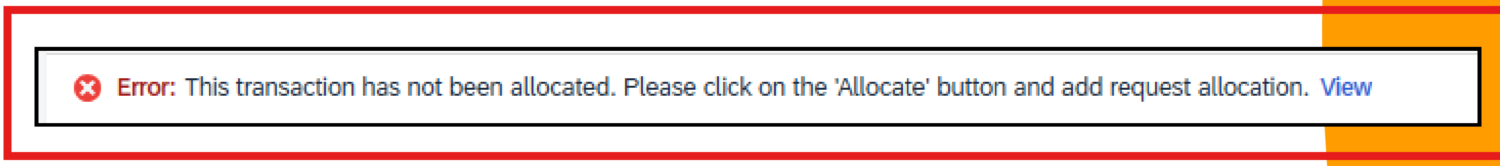
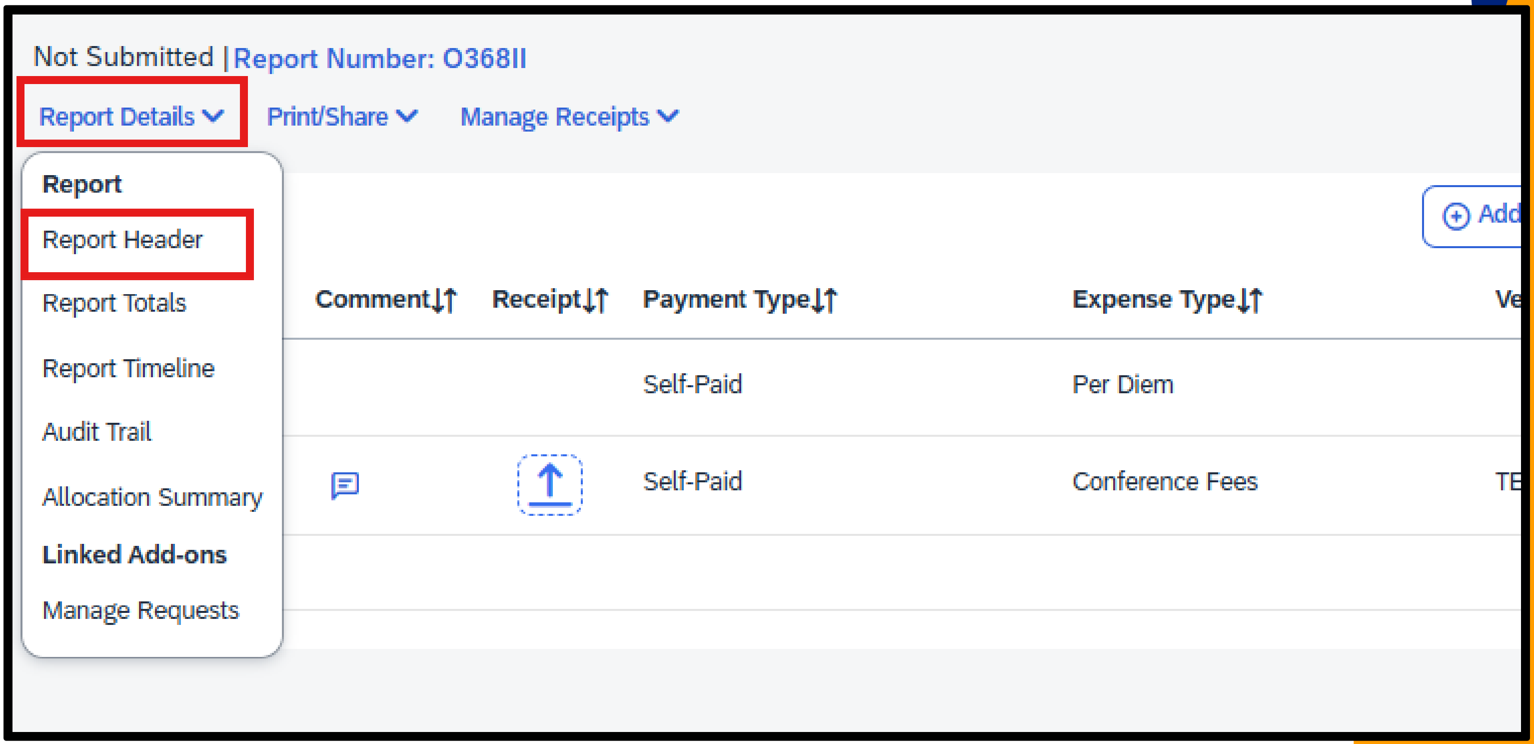
Red Error message will prohibit you from submitting the report. You will need to correct the error before submitting the report.





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).



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