

SAP Concur

PROCUREMENT SERVICES DIVISION



End-USER Training

How to Submit a Travel Request
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 request on behalf of another employee in Concur.

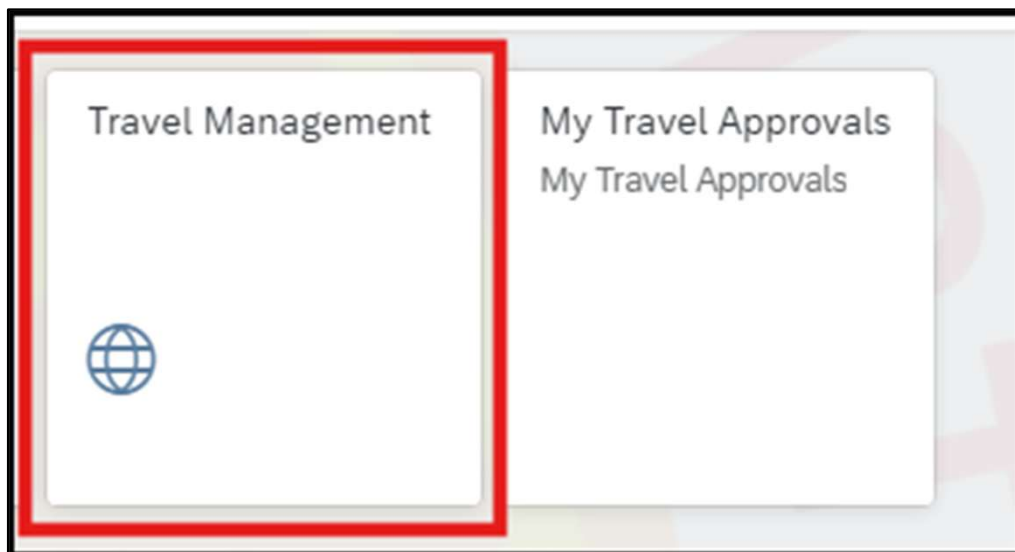
1

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



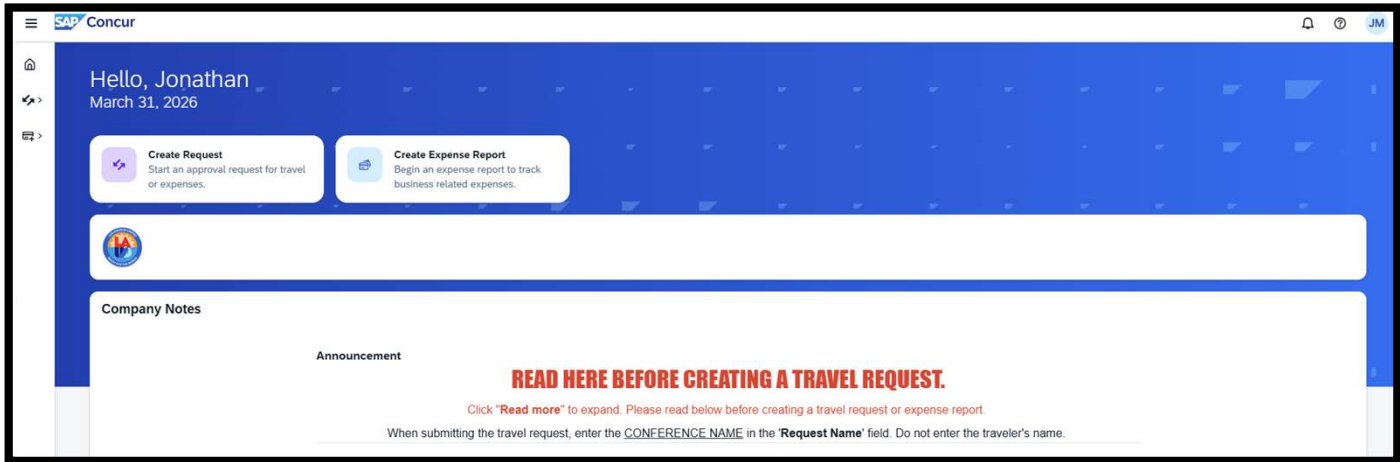
2

Click on the **Travel Management** tile.



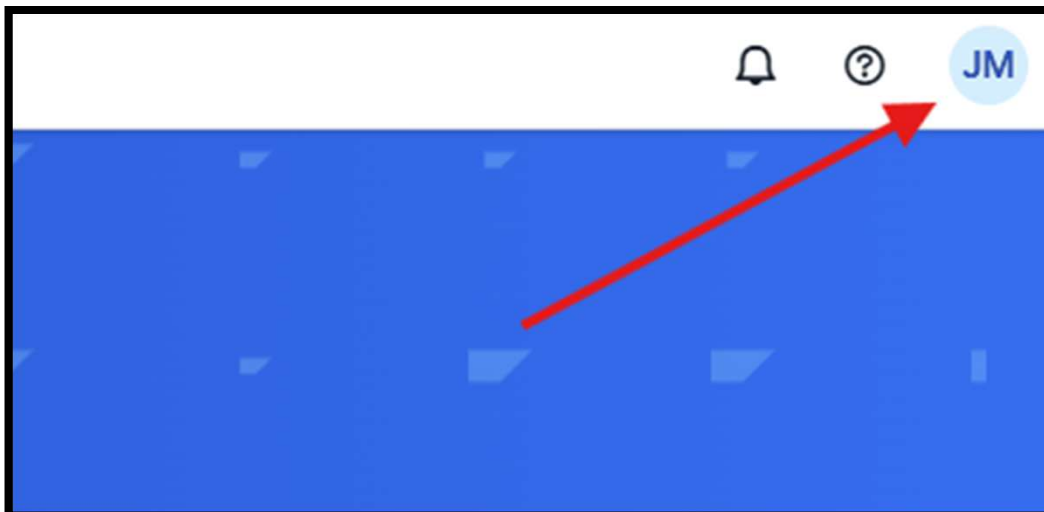
3

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



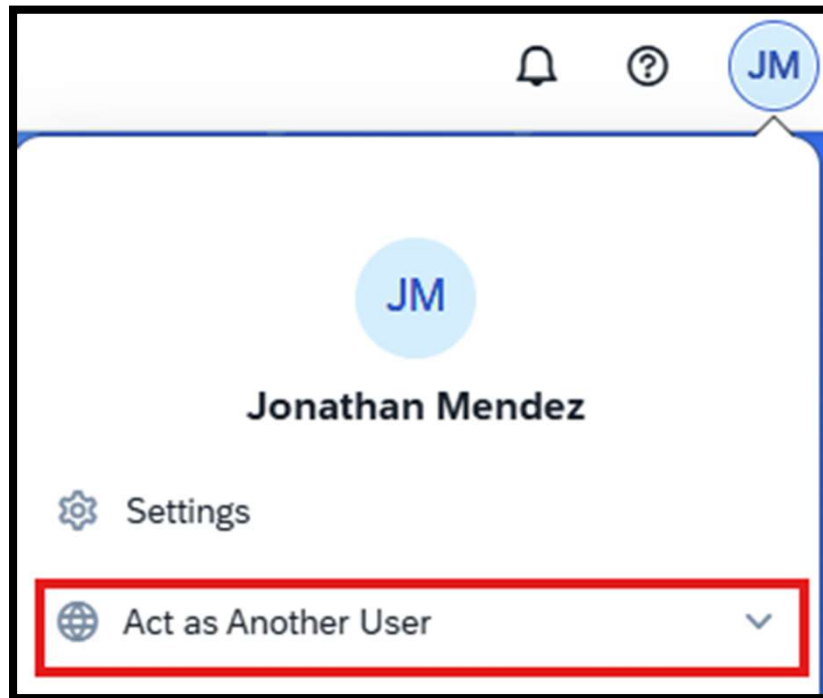
4

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



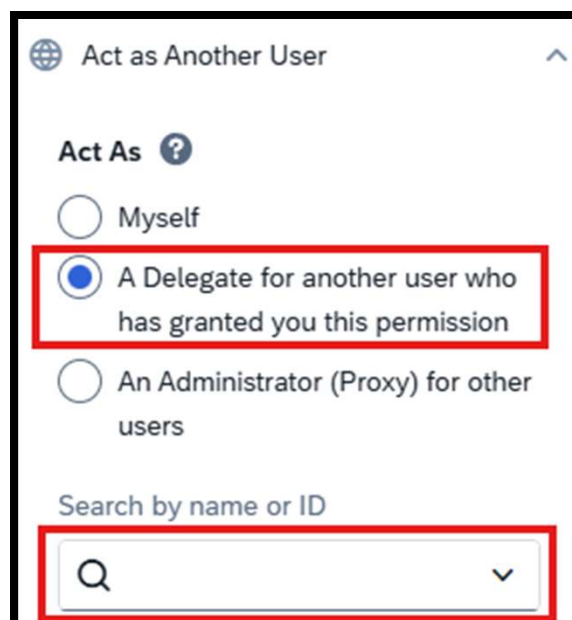
5

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**.

Act as Another User

Act As ?

☐ Myself

☒ A Delegate for another user who has granted you this permission

☐ An Administrator (Proxy) for other users

Search by name or ID

Q Nakamura, Ikumi

Switch

8

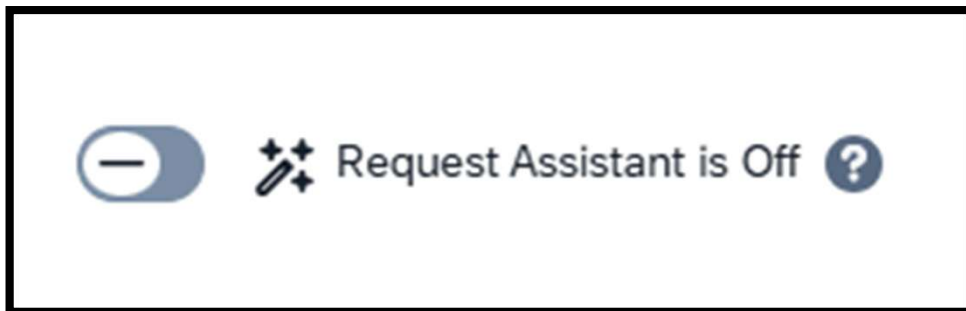
Click **Create Request**.

 **Create Request**
Start an approval request for travel or expenses.

 **Create Expense Report**
Begin an expense report to track business related expenses.

9

IMPORTANT: Begin by scrolling down to the bottom of the new window and turning **Off** the **Request Assistant Button** on the left-hand side. Scroll back up to begin entering the trip details.



10

The **Start Date** & **End Date** should be the date of the traveler's departure and return from the trip. Enter the **NAME OF THE CONFERENCE** in **Request Name** field.

The screenshot shows a form with the following fields and values:

- Request Name ***: Test Travel Request
- Booking Type (Request-to-Travel) ***: District-paid using school/office's P-Card... (dropdown menu)
- Start Date ***: 05/04/2026
- End Date ***: 05/09/2026

The fields for Request Name, Start Date, and End Date are highlighted with a red border.

11

If you select **Other-enter explanation in Request Purpose** under the **Freeze Justification field**, explain the reason in the **Purpose field**. Be specific such as presenting on behalf of LAUSD, required grant training, award recipient, PD, etc.

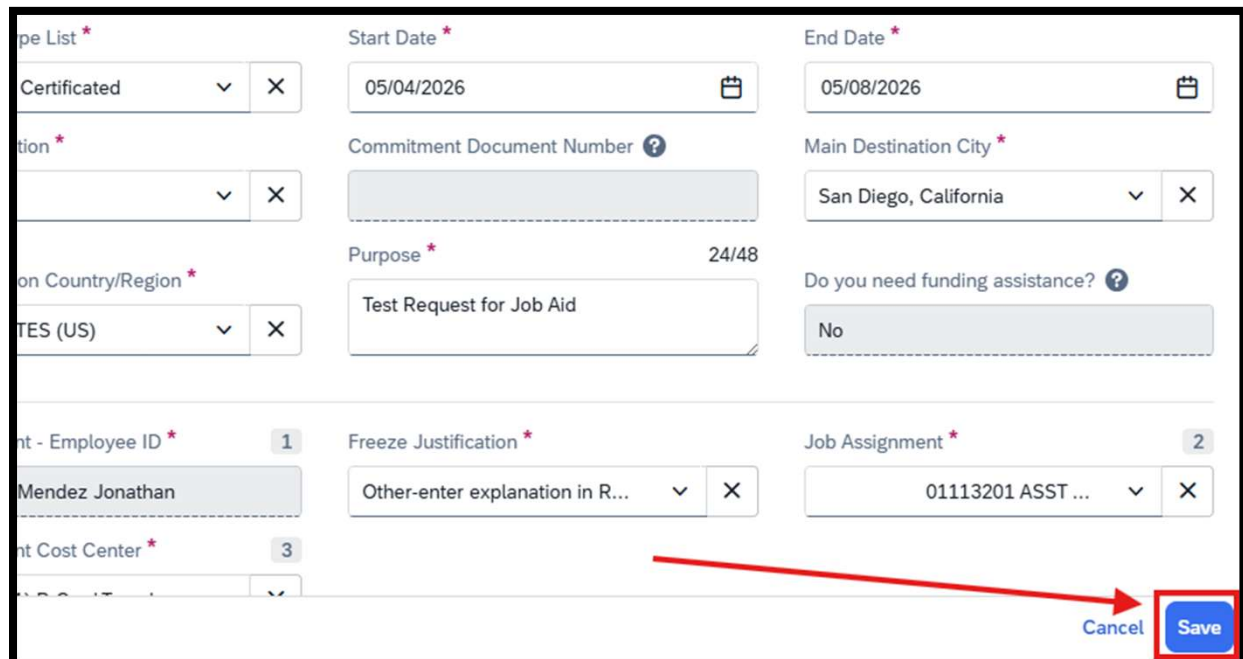
The screenshot shows the following fields:

- Purpose ***: A text area for entering the purpose of the request. The character count "0/48" is displayed in the top right corner.
- Freeze Justification ***: A dropdown menu for selecting a justification type.

The entire section is highlighted with a red border.

12

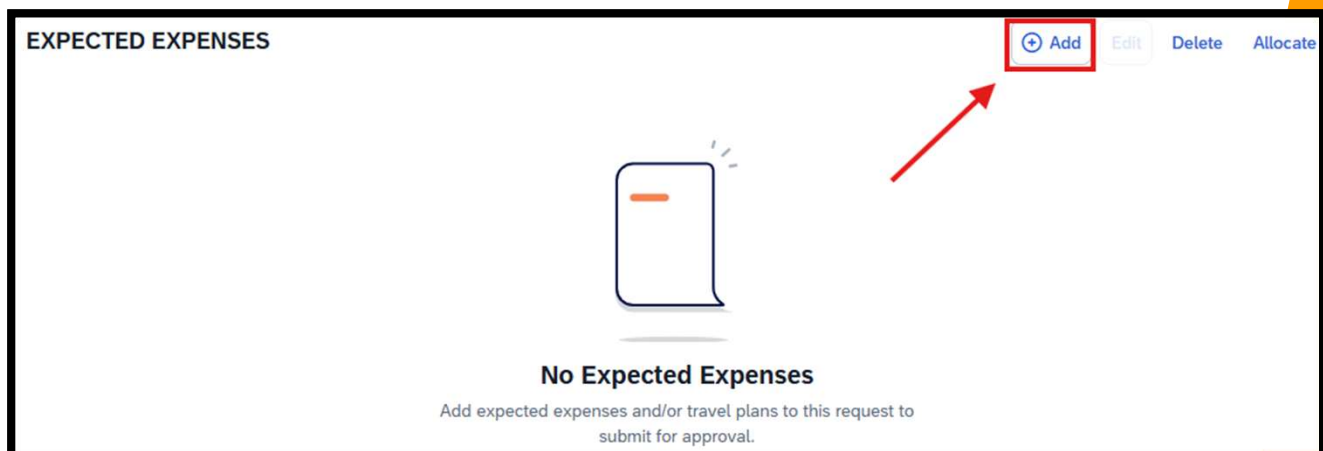
After filling out all the required fields, click **Create Request**.



A screenshot of a web form for creating a request. The form contains several fields: 'Type List' (dropdown menu), 'Start Date' (calendar icon), 'End Date' (calendar icon), 'Main Destination City' (dropdown menu), 'Purpose' (text input), 'Do you need funding assistance?' (dropdown menu), 'Employee ID' (dropdown menu), 'Freeze Justification' (dropdown menu), and 'Job Assignment' (dropdown menu). A red arrow points from the bottom right of the form to a blue 'Save' button, which is highlighted with a red box. A 'Cancel' button is also visible next to it.

13

Click **Add** to add an expense type.



A screenshot of the 'EXPECTED EXPENSES' section of a web application. The section title is 'EXPECTED EXPENSES'. Below the title, there is a large empty box with a red arrow pointing to a blue 'Add' button in the top right corner. The 'Add' button is highlighted with a red box. Below the 'Add' button, there is a blue icon of a document with a red line through it. Below the icon, the text 'No Expected Expenses' is displayed. At the bottom, there is a message: 'Add expected expenses and/or travel plans to this request to submit for approval.'

14

Search for your desired **Expense Type**, then click on the **expense**.

Add expected expenses and/or travel plans

person X Q

Collapse All Sections

02. Transportation

Personal Car Mileage

15

For Personal Car Mileage, select **Travel Mileage** and add the total distance for the whole duration of the trip.

(Ex: 10 miles round trip for 4 days is 40 miles)

Business Purpose 24/48

Test Request for Job Aid

Currency *
US, Dollar (USD) X

Mileage *

Search by Text Q X

Non-Travel Mileage

Travel Mileage

Self-Paid

16

Click **Save**.

New Expense: Personal Car Mileage

Allocate

Required field *

Transaction Date * 04/01/2026

Business Purpose 24/48 Test Request for Job Aid

Mileage * Travel Mileage

Distance

Transaction Amount *

Currency * US Dollar (USD)

Payment type * Self-Paid

Comment 0/2000

Save Cancel

Save Cancel

17

Click **Add** again to add another expense type.

Alerts: 2

Test Travel Request \$29.00

Submit Request Delete Request

Not Submitted | Request ID: 3XKF | 05/04/2026 - 05/08/2026

Request Details Print Attachments

EXPECTED EXPENSES

Alert Edit Delete Allocate

Alert	Expense type	Details	Date	Amount	Requested
☐	Personal Car Mileage		04/01/2026	\$29.00	\$29.00
					\$29.00

18

Search for another **Expense Type**, then click on the **expense**.

Add expected expenses and/or travel plans

hotel X Q

Collapse All Sections

01. Travel Expenses

Hotel

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For **Hotel** expense, enter the **Hotel City**, **Hotel Vendor**, **Total Amount**, **Hotel Business Purpose**, and **Payment Type**.

Check-In

Date: 05/05/2025 At: hh:mm A

City *
Palm Springs, California X v

Check-Out

Date: 05/07/2025 At: hh:mm A

Vendor *
(Hilton Hotels) Hilton Hotels X v

Comment 0/2000

Business Purpose 0/48

Total Amount *
600.00

Hotel Business Purpose *
*Hotel expense is less than \$300 USD per night v

Payment type *
LAUSD District Paid-P-Card, PO, Imprest v

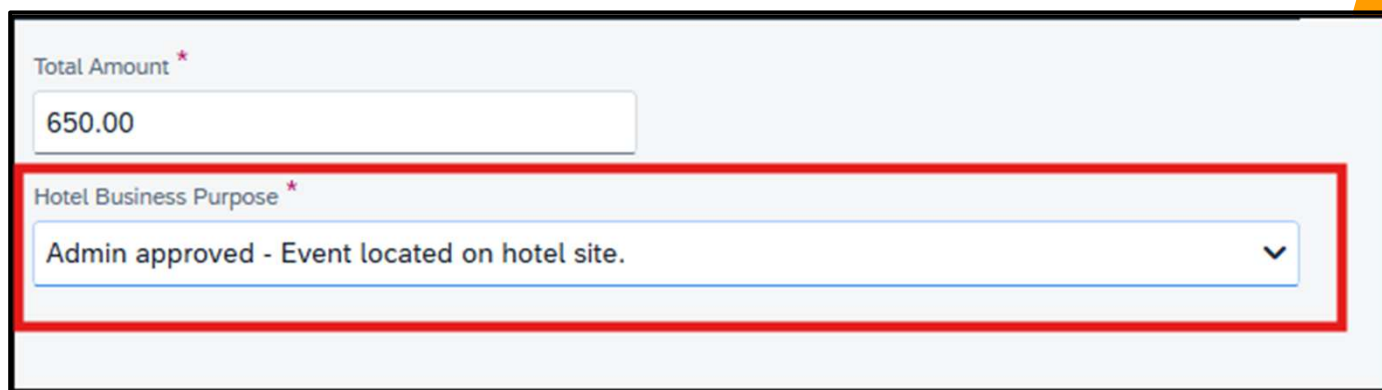
Save Cancel

If the Hotel vendor does not appear, select **Other Hotel**.



A screenshot of a web form showing a dropdown menu for 'Vendor *'. The dropdown is open, displaying the text '(Other Hotel) Other Hotel' and a close button (X) and a dropdown arrow (v). The entire dropdown menu is highlighted with a red border.

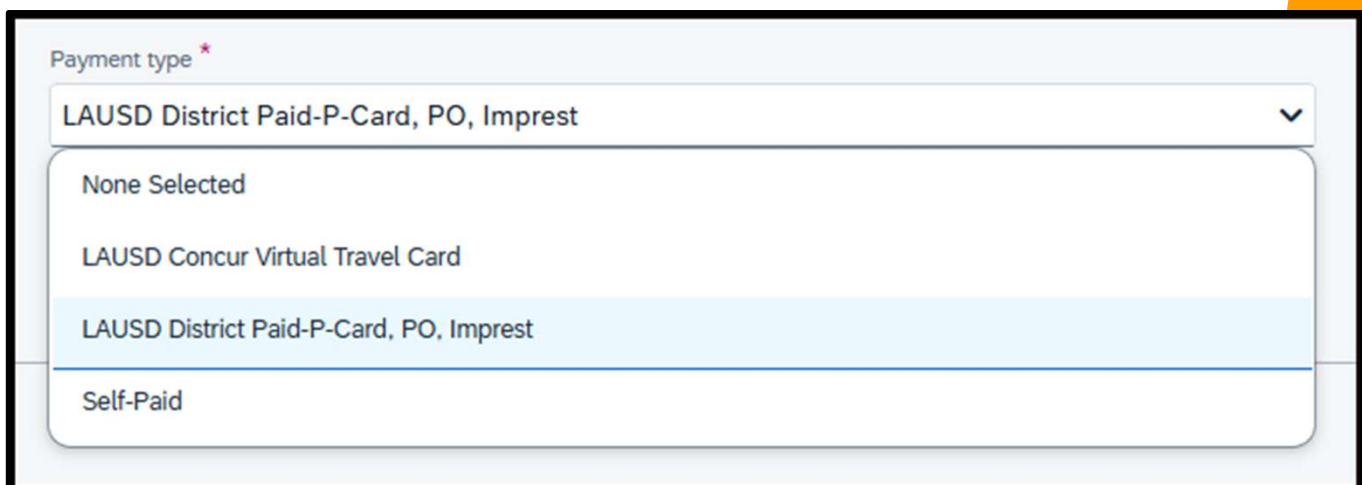
If your **Total Amount** is **MORE than \$400 PER NIGHT**, you must obtain pre-approval from your administrator and select the correct **Hotel Business Purpose** statement. **Your request will be rejected if you enter inaccurate information.**



A screenshot of a web form showing two fields. The first field is 'Total Amount *' with the value '650.00'. The second field is 'Hotel Business Purpose *' with the value 'Admin approved - Event located on hotel site.' and a dropdown arrow (v). The second field is highlighted with a red border.

- **LAUSD Concur Virtual Card:** Reserved for booking Hotels or Airfare in Concur using the Concur Booking Tool. **Requires the Booking Type field in the header to be set to District–Paid Using Concur Travel Booking.**
- **LAUSD Concur District Paid P–Card, PO:** Hotel expense is paid with your school/office location's P–Card, Purchase Order.
- **Self–Paid:** Traveler pays upfront, receives reimbursement after the trip.

Requests must be approved before making any travel arrangements.



The screenshot shows a web form with a dropdown menu labeled "Payment type *". The dropdown is open, showing a list of options. The currently selected option is "LAUSD District Paid-P-Card, PO, Imprest", which is highlighted in light blue. Other options in the list include "None Selected", "LAUSD Concur Virtual Travel Card", and "Self-Paid".

Payment type *
LAUSD District Paid-P-Card, PO, Imprest
None Selected
LAUSD Concur Virtual Travel Card
LAUSD District Paid-P-Card, PO, Imprest
Self-Paid

22

Click **Add** again to add another **expense**.

TESTING \$900.70 Submit Request Delete Request

Not Submitted | Request ID: 3JJW

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

EXPECTED EXPENSES Add Edit Delete Allocate

☐	Alert↑↓	Expense type↑↓	Details↑↓	Date↑↓	Amount↑↓	Requested↑↓
☐	✖	Hotel	Santa Barbara, California	07/15/2025	\$900.00	\$900.00
☐	✖	Personal Car Mileage		02/05/2025	\$0.70	\$0.70
						\$900.70

23

For **Per Diem**, enter the **Total Number Days of Trip**, **Number of Full Days**, **Number of Half Days**, **Number of Meals Provided** (only include lunch and/or dinner provided by third-party vendor). **Total Number Days of Trip** must equal **Number of Full Days + Number of Half Days**.

New Expense: Per Diem Save Cancel

[Allocate](#)

Required field *

Business Purpose 24/48

Trip Start Date * 05/04/2026 📅

Trip End Date * 05/08/2026 📅

Total Number Days of Trip *

Number of Full Days * ?

Number of Half Days * ?

Number of Meals Provided * ?

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Click **Save**. The **Per Diem** rate will automatically calculate based on the information you provided.

The screenshot shows a form titled "New Expense: Per Diem". It includes fields for "Business Purpose" (containing "Test Request for Job Aid"), "Trip Start Date" (05/04/2026), "Trip End Date" (05/08/2026), "Total Number Days of Trip", "Number of Full Days", "Number of Half Days", "Number of Meals Provided", "Transaction Amount", "Currency" (US, Dollar (USD)), and "Payment type" (Self-Paid). There is a "Comment" field at the bottom. Two red arrows point to the "Save" buttons: one at the top right and one at the bottom left.

25

Once you've entered **all** the **expenses**, check the boxes to highlight each **expense type**.

The screenshot shows a table titled "EXPECTED EXPENSES". The first column contains checkboxes, all of which are checked. The second column contains red 'X' marks. The third column lists expense types: "Alert", "Hotel", "Personal Car Mileage", and "Per Diem". A red box highlights the first column of checkboxes.

☒	Alert↓↑	Expense type↓↑
☒	×	Hotel
☒	×	Personal Car Mileage
☒	×	Per Diem

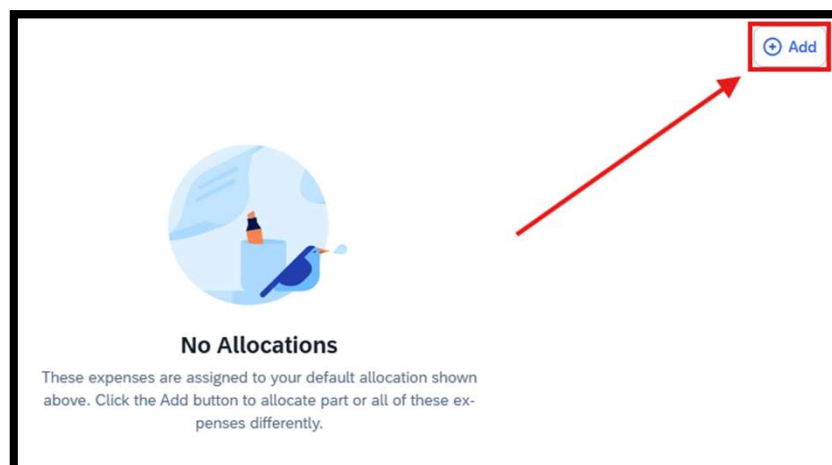
26

To add a **funding line**, click **Allocate**. The funding line is provided by the department funding the travel or the traveler's worksite.

+ Add	Edit	Delete	Allocate
Date↓	Amount↓↑	Requested↓↑	
05/04/2026	\$600.00	\$600.00	
04/01/2026	\$120.35	\$120.35	
04/01/2026	\$360.00	\$360.00	
			\$1,080.35

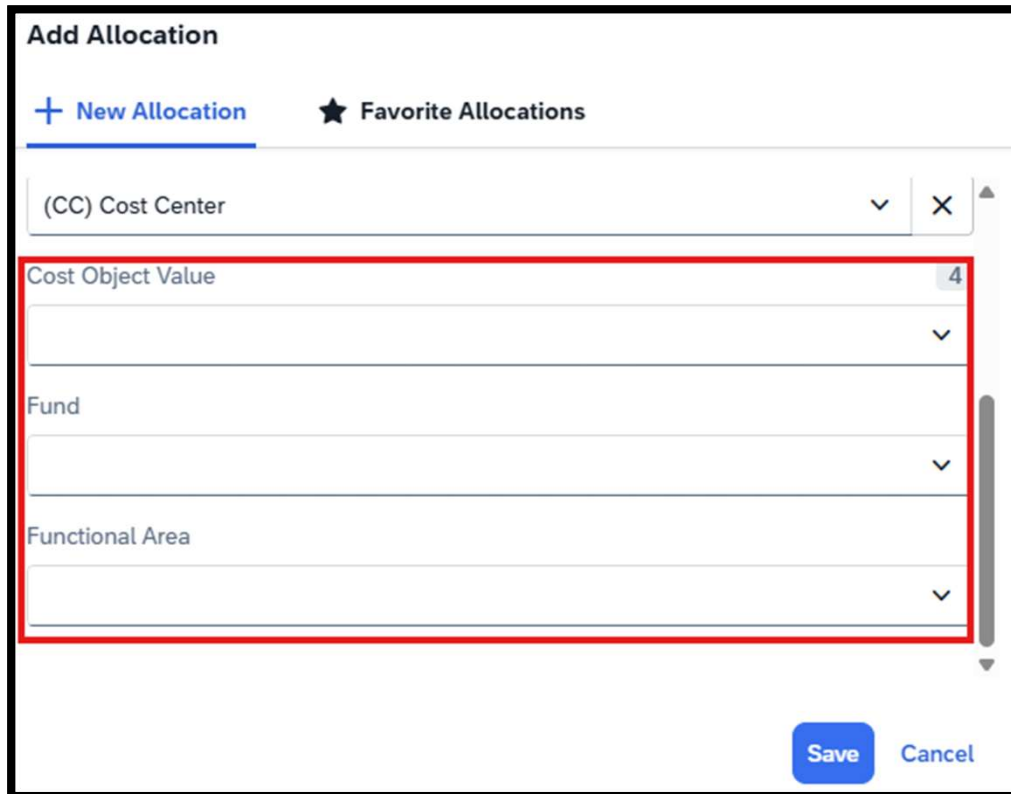
27

Click **Add**.



28

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



The screenshot shows the 'Add Allocation' form. At the top, there are two tabs: '+ New Allocation' (active) and '★ Favorite Allocations'. Below the tabs is a search bar containing '(CC) Cost Center'. The main form area contains three fields: 'Cost Object Value', 'Fund', and 'Functional Area'. Each field has a dropdown arrow on the right. A red rectangular box highlights these three fields. At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

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Type the full **funding cost center** number in the **Cost Object Value** field and select it.



This screenshot is a close-up of the 'Cost Object Value' field. The field is highlighted with a red border. It contains the text 'Contract Admin and Procurement Services' and a dropdown arrow. To the right of the field is a small 'X' icon. Below this field are the 'Fund' and 'Functional Area' fields. The 'Fund' field contains 'GF-Unrestricted' and the 'Functional Area' field contains 'General Fund Sch Program'. Both have dropdown arrows and 'X' icons.

30

Type the numerical code & select the **Fund**. Include hyphens.

Cost Object Value	4
Contract Admin and Procurement Services	▼ X
Fund	
GF-Unrestricted	▼ X
Functional Area	
	▼

31

Type the numerical code & select the **Functional Area**. Include hyphens.

Cost Object Value	4
Contract Admin and Procurement Services	▼ X
Fund	
GF-Unrestricted	▼ X
Functional Area	
General Fund Sch Program	▼ X

32

Click **Save**.

Add Allocation

[+ New Allocation](#) [★ Favorite Allocations](#)

(CC) Cost Center ▼ ✕

Cost Object Value 4

Contract Admin and Procurement Services ▼ ✕

Fund

GF-Unrestricted ▼ ✕

Functional Area

General Fund Sch Program ▼ ✕

Save [Cancel](#)

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

Allocations (1)

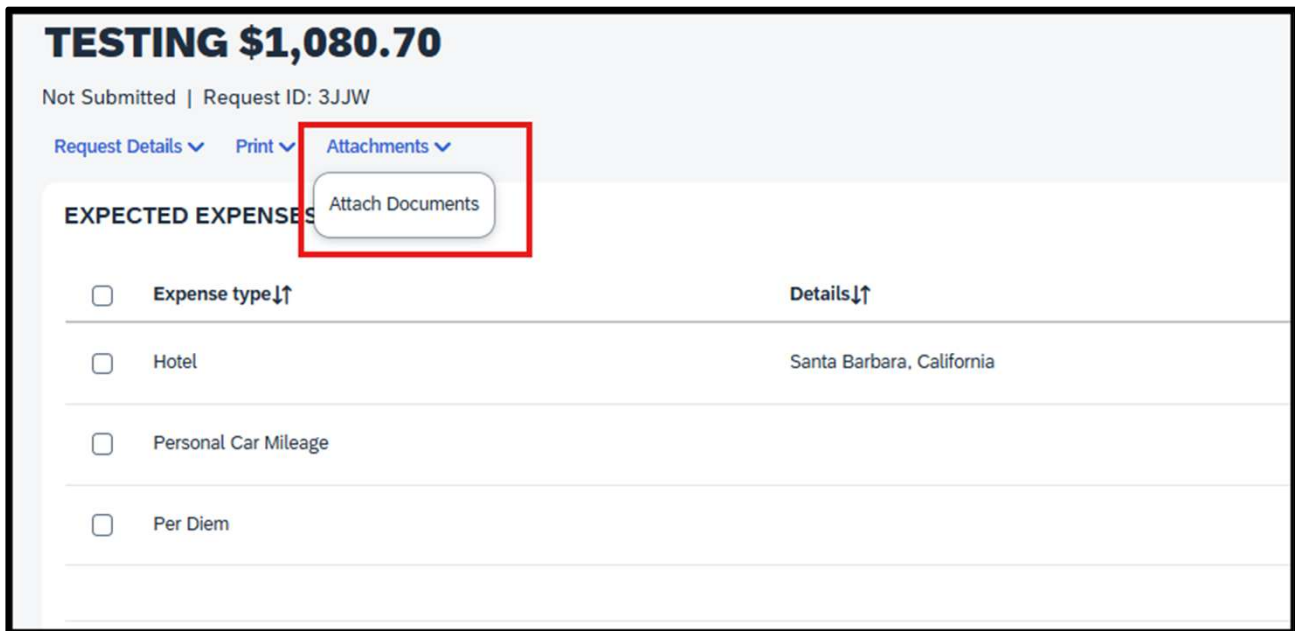
[+ Add](#) [Edit](#) [Remove](#) [Save as Favorite](#)

☐	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

Save [Cancel](#)

34

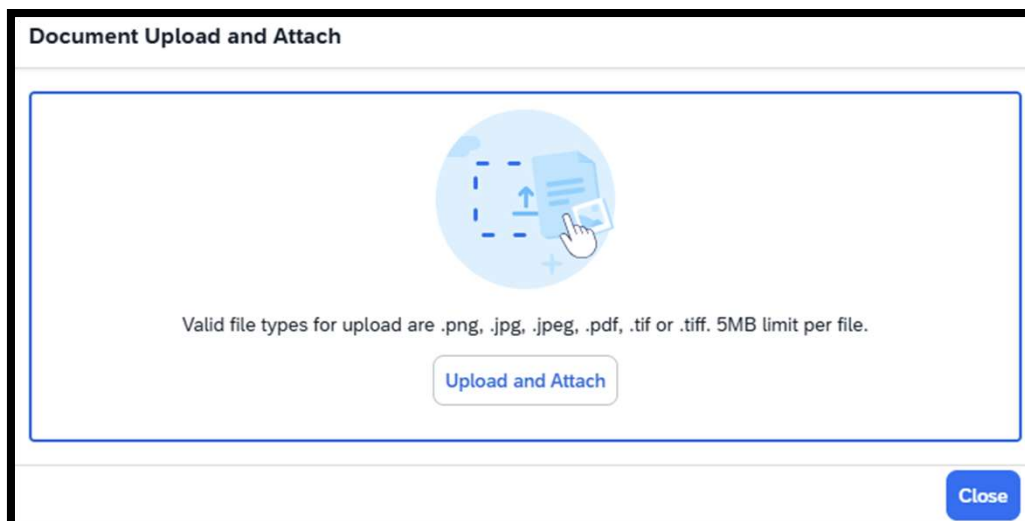
Upload the required documents. Click **Attachments** → **Attach Documents**.



The screenshot shows a web interface for a request titled "TESTING \$1,080.70". Below the title, it says "Not Submitted | Request ID: 3JJW". There are three tabs: "Request Details", "Print", and "Attachments". The "Attachments" tab is selected, and a dropdown menu is open, showing "Attach Documents" as the only option. Below the tabs, there is a section titled "EXPECTED EXPENSES" with a table. The table has two columns: "Expense type" and "Details". The table contains four rows: "Expense type" (with a sort icon), "Hotel" (with "Santa Barbara, California" in details), "Personal Car Mileage", and "Per Diem".

35

You can drag & drop the document in the box or click on **Upload and Attach** to search for & attach your file.



The screenshot shows a dialog box titled "Document Upload and Attach". Inside the dialog, there is a large blue dashed box with a document icon and an upward arrow, indicating a drag-and-drop area. Below this, it says "Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file." At the bottom of the dialog, there is a button labeled "Upload and Attach". A "Close" button is located in the bottom right corner of the dialog.

36

Yellow Warning Signs will not prohibit you from submitting the **request**.

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

EXPENSE | Hotel | 05/09/2026 | \$1,500.00 |

 **Warning:** Hotel expenses are not to exceed \$400 per night, including related taxes and fees.

37

Red Error messages will prohibit you from submitting the **request**. You will need to correct the error before submitting the **request**.

EXPENSE | Hotel | 05/08/2026 | \$600.00 |

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

38

Click **Submit Request** to submit the request for approval.

Test Travel Request \$1,980.35

Not Submitted | Request ID: 3XKF | 05/04/2026 - 05/09/2026

Request Details ▾ Print ▾ Attachments ▾

EXPECTED EXPENSES ⊕ Add Edit Delete Allocate

☐	Alert↓↑	Expense type↓↑	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
☐	⚠	Hotel	San Diego, California	05/04/2026	\$1,500.00	\$1,500.00 <i>Allocated</i>
☐		Personal Car Mileage		04/01/2026	\$120.35	\$120.35 <i>Allocated</i>
☐		Per Diem		04/01/2026	\$360.00	\$360.00 <i>Allocated</i>
						\$1,980.35

39

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

Test Travel Request \$1,980.35

Not Submitted | Request ID: 3XKF | 05/04/2026 - 05/09/2026

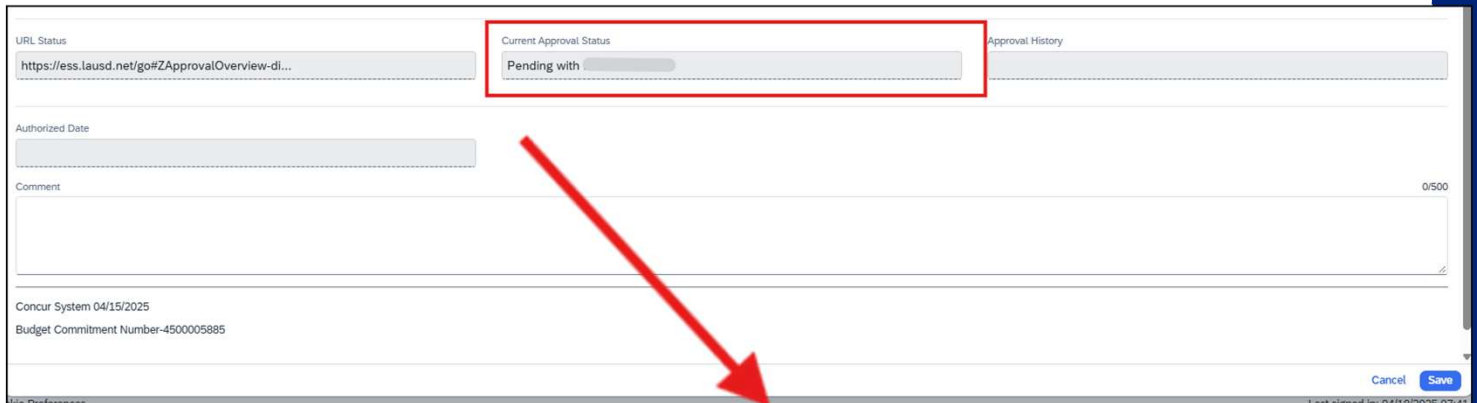
Request Details ▾ Print ▾ Attachments ▾

- Request
- Edit Request Header**
- Request Timeline
- Audit Trail
- Allocation Summary

EXPECTED EXPENSES

Expense type↓↑	Details↓↑
Hotel	San Diego

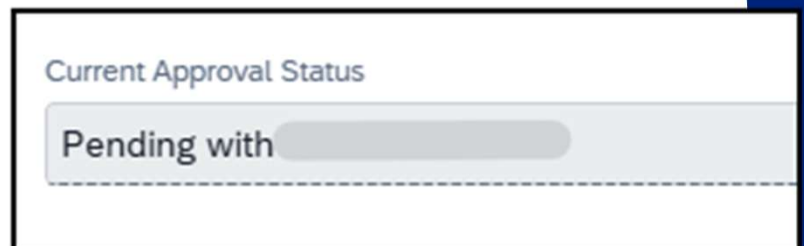
Scroll down to **Current Approval Status**. It will state the name of the approver.



The screenshot shows a web interface with the following fields:

- URL Status: <https://ess.lausd.net/go#ZApprovalOverview-di...>
- Current Approval Status: Pending with [redacted]
- Approval History
- Authorized Date
- Comment (0/500)
- Concur System 04/15/2025
- Budget Commitment Number-4500005885
- Cancel Save

A red box highlights the "Current Approval Status" field, and a red arrow points from it to a callout box.



Current Approval Status

Pending with [redacted]