SAP Concur

PROCUREMENT SERVICES DIVISION

End-USER Training

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

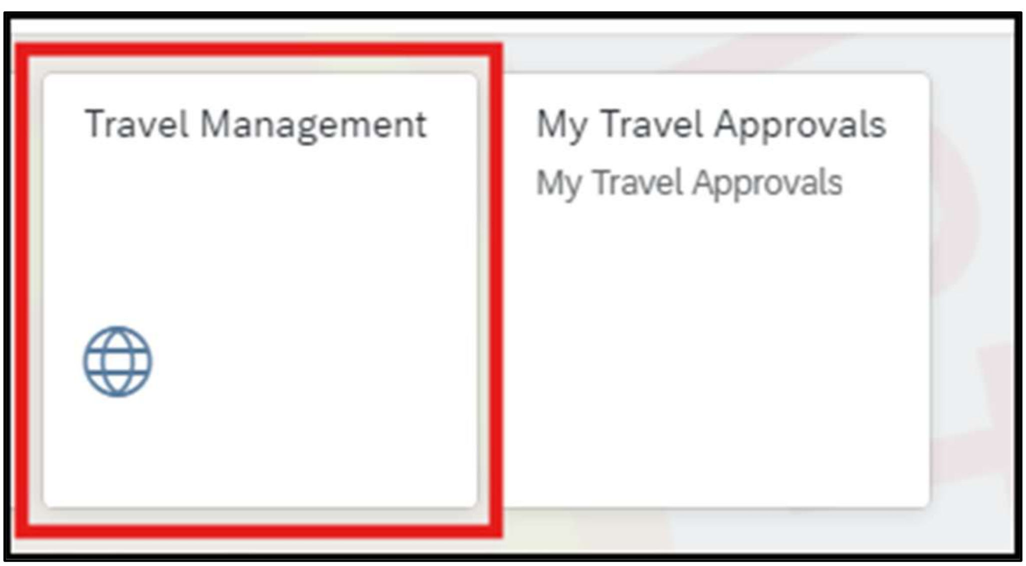
The purpose of this job aid is to show Site Travel Specialists on how to submit a travel request on behalf of another employee in Concur.

1

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

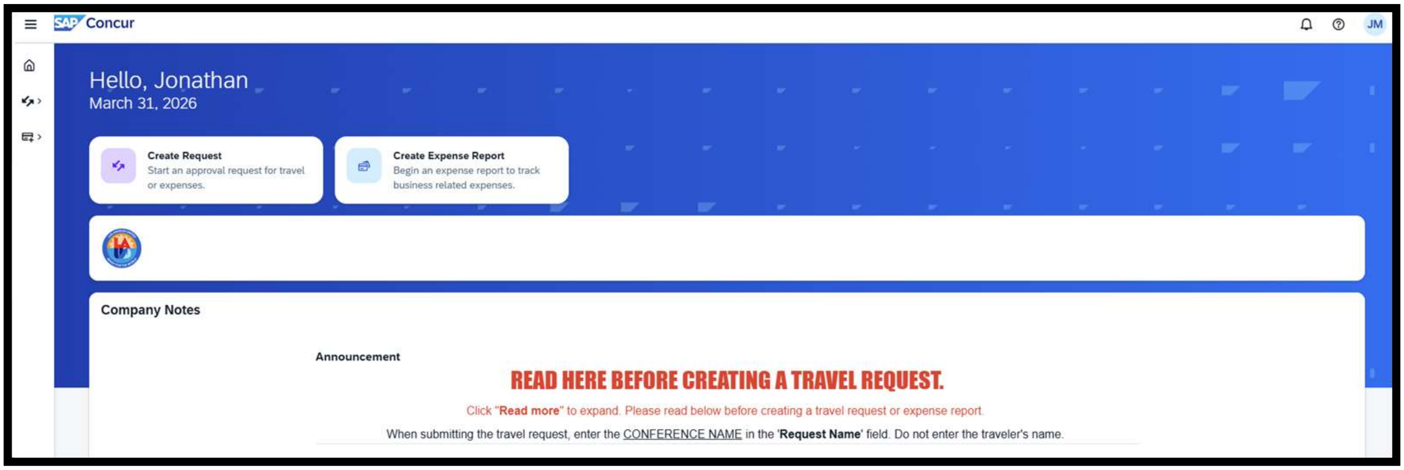
2

Click on the **Travel Management** tile.



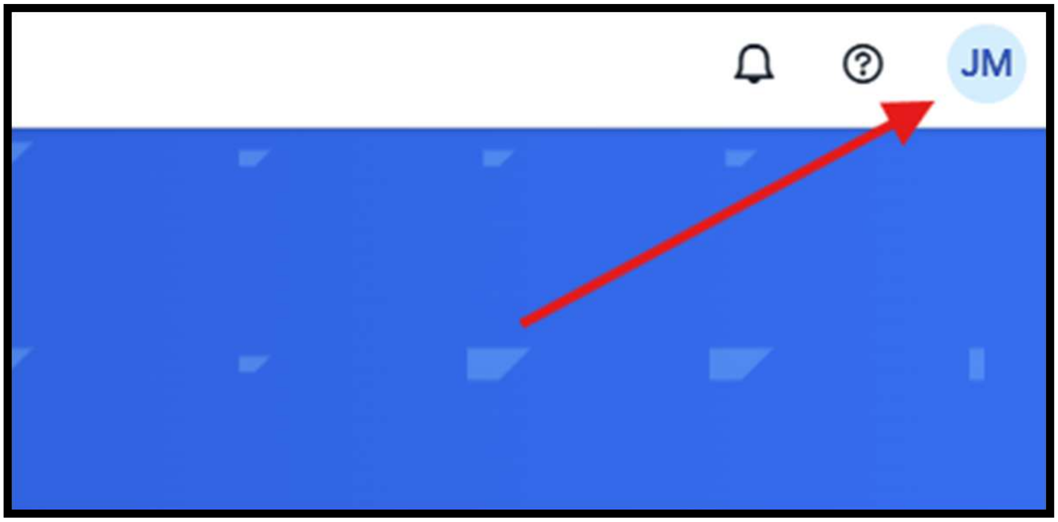
3

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



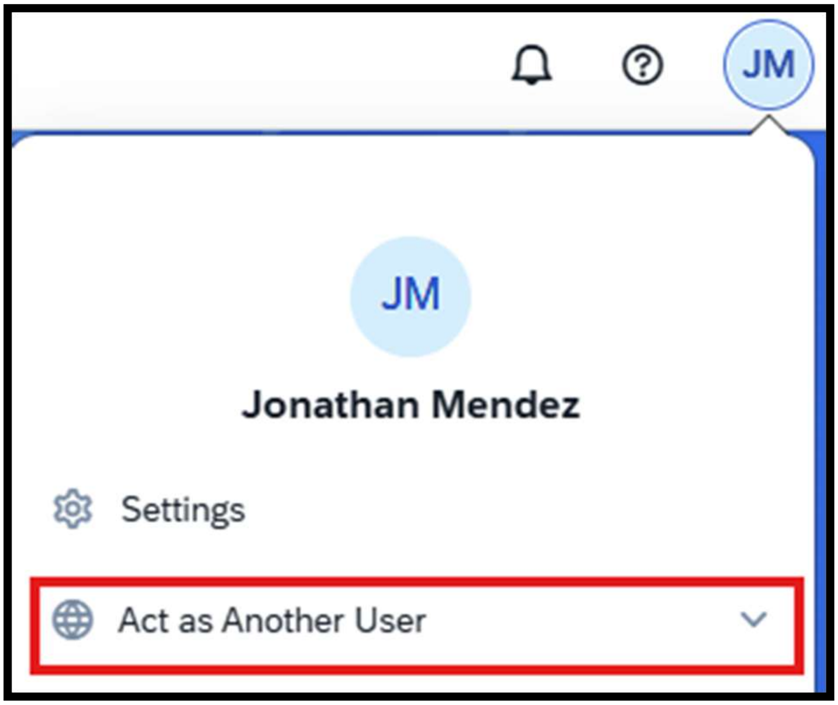
4

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



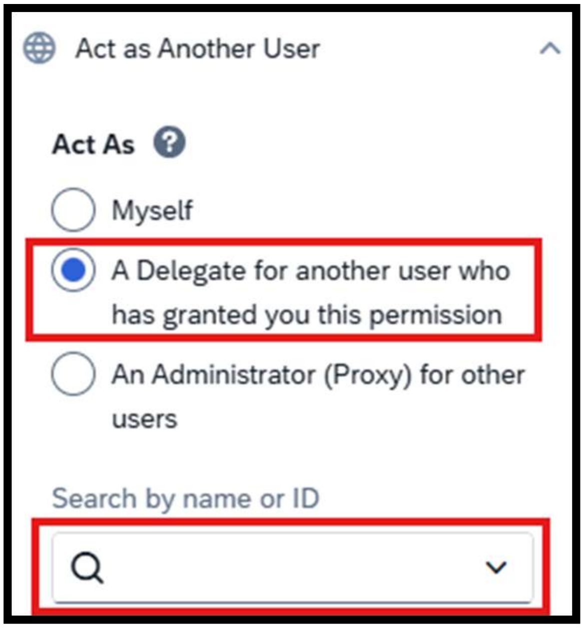
5

Click **Act as Another User**.



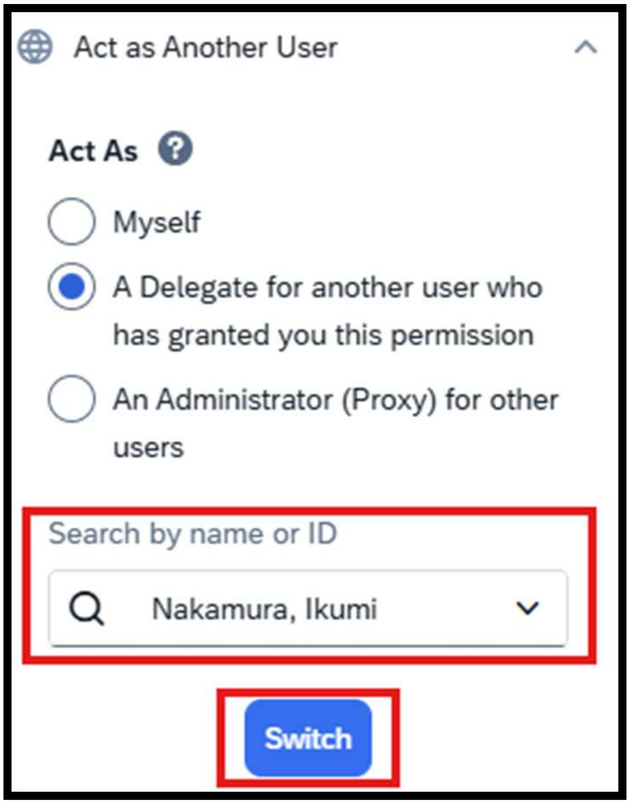
6

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



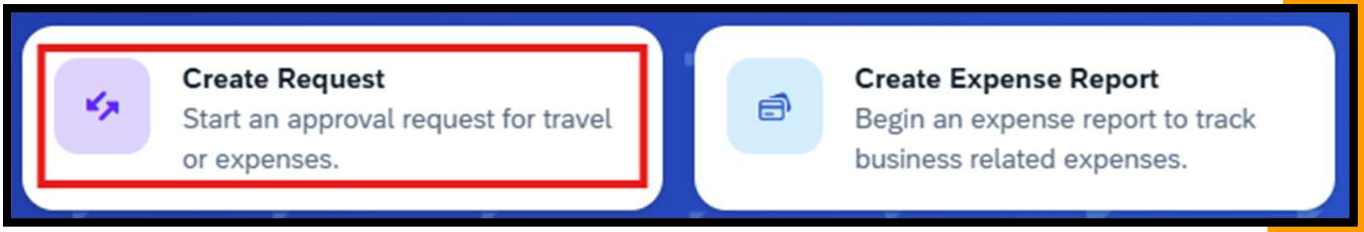
7

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



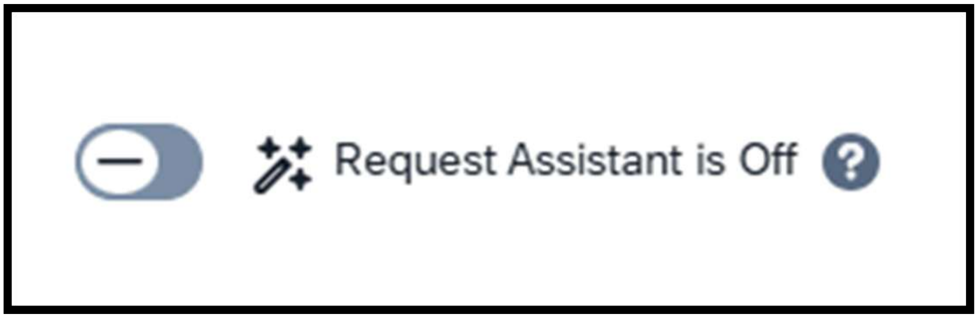
8

Click **Create Request**.



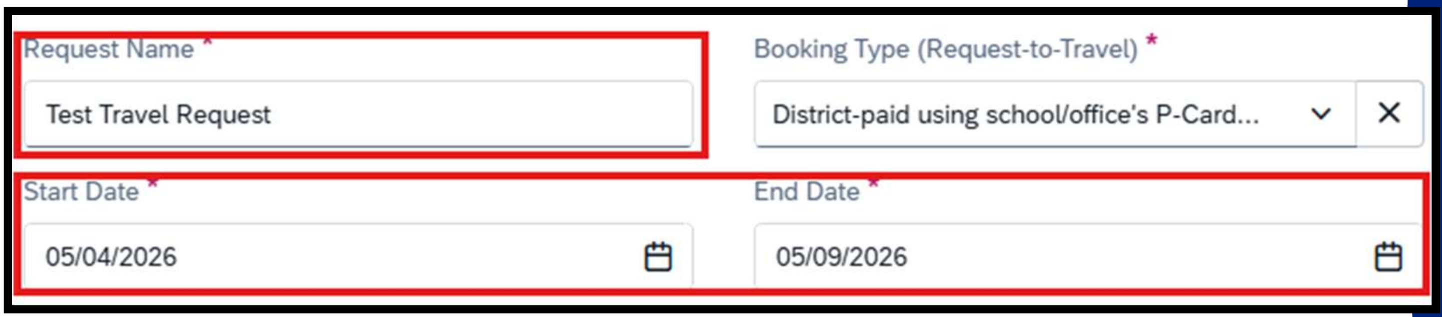
9

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.

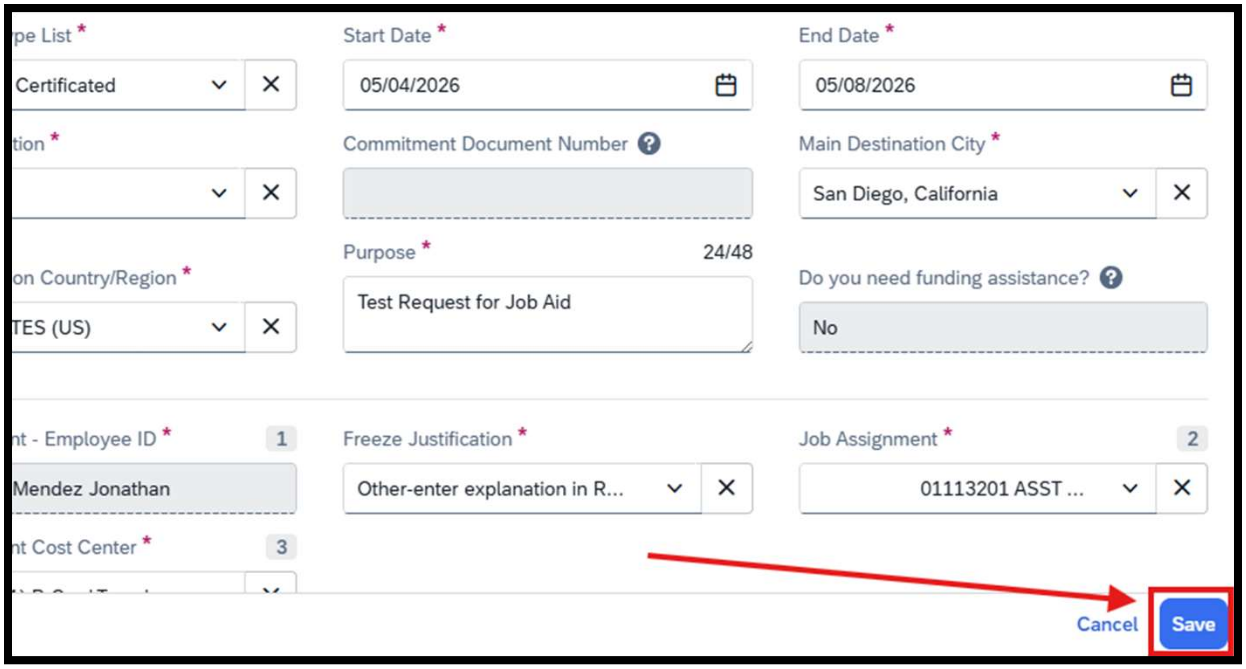


11

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

12

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



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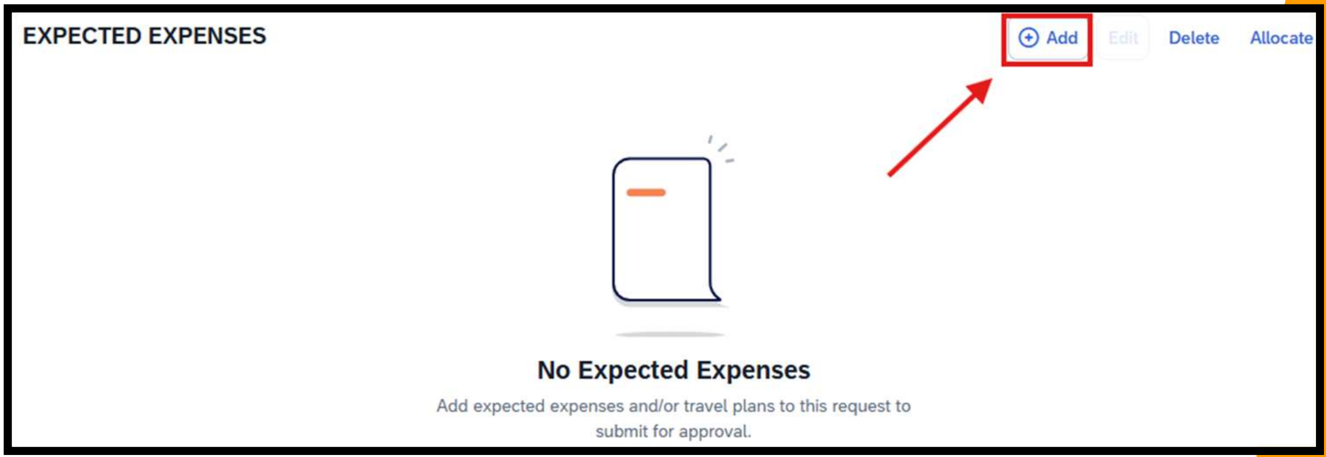
Click **Add** to add an expense type.



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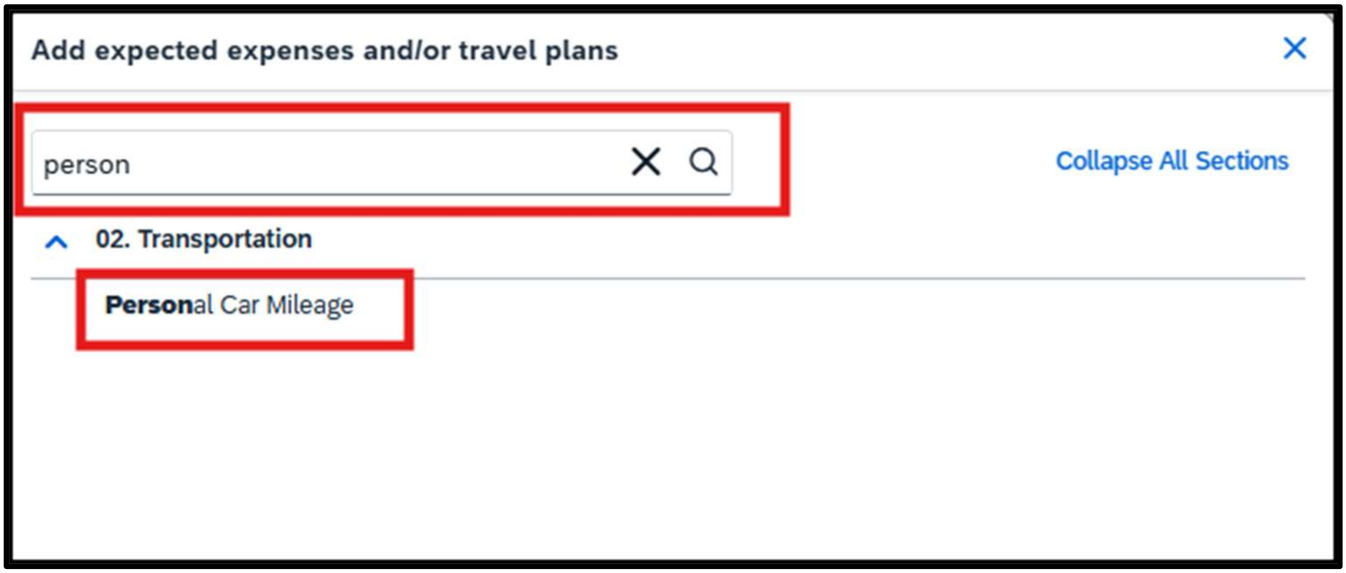
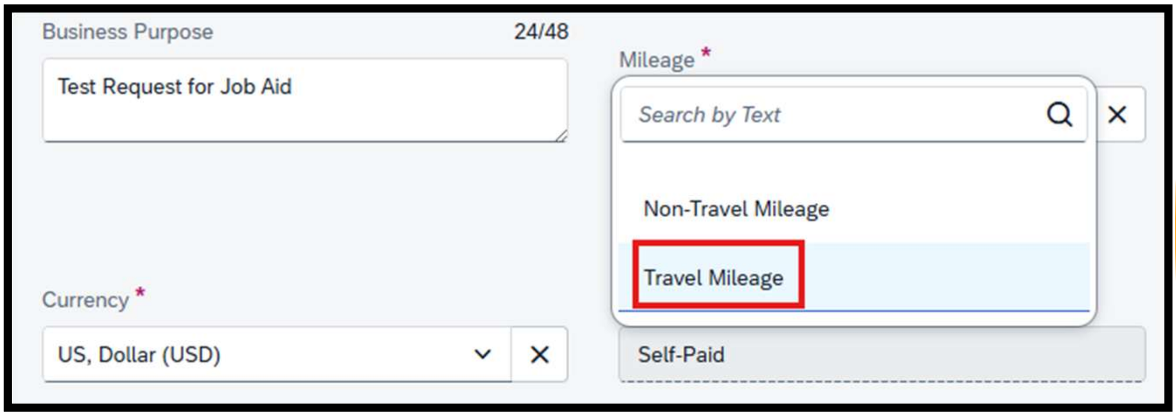
Search for your desired **Expense Type**, then click on the **expense**.



15

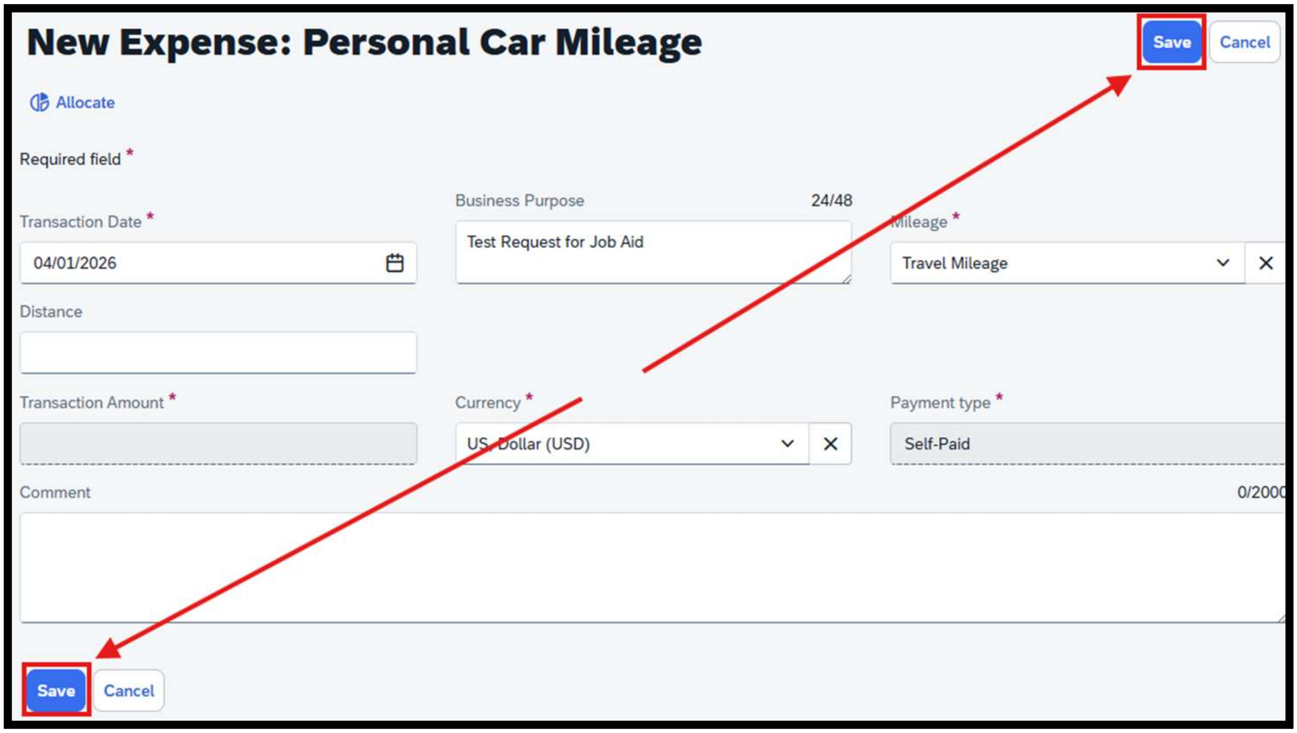
For Personal Car Mileage, select **Travel Mileage** and add the total distance for the whole duration of the trip.

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



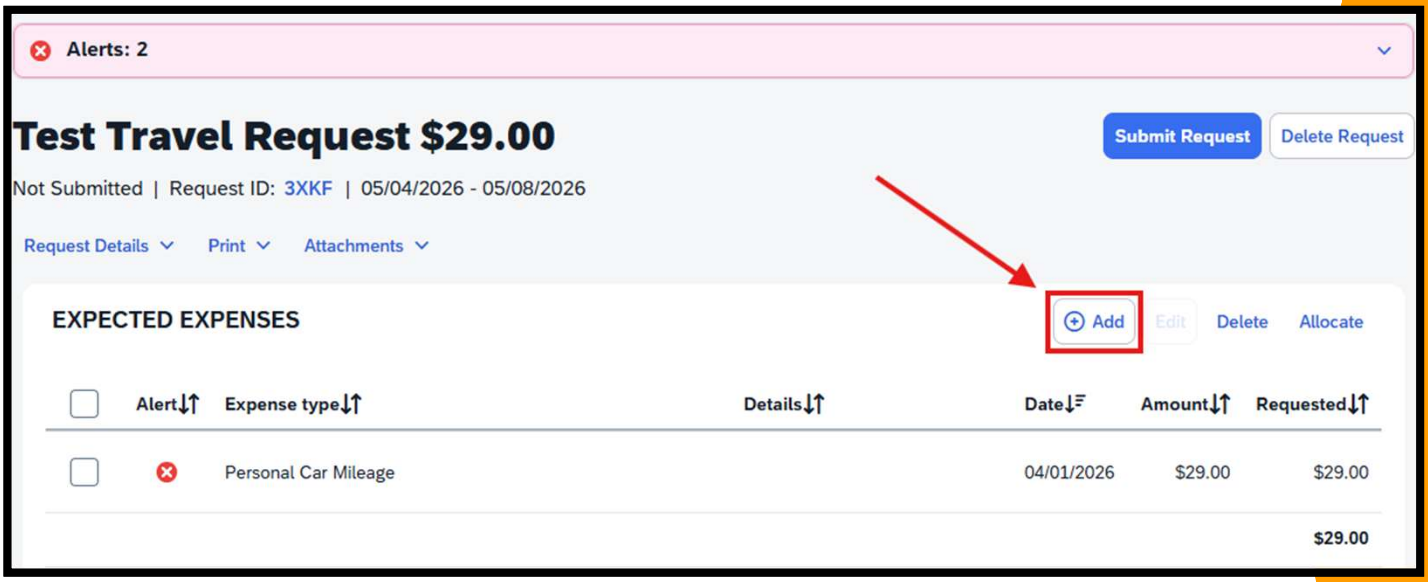
16

Click **Save**.



17

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



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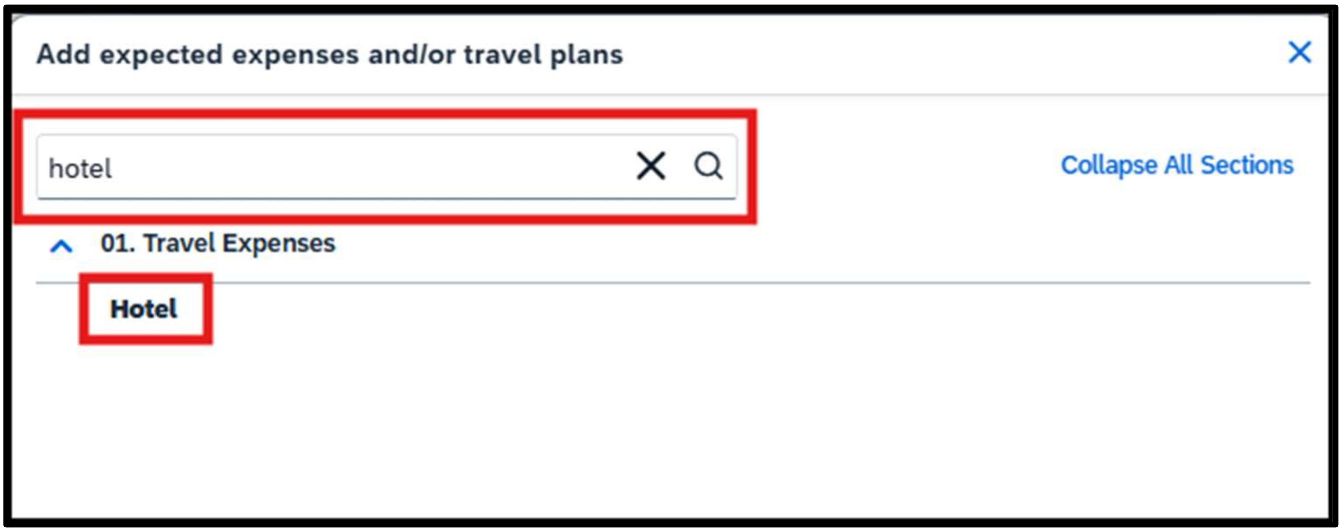
Search for another **Expense Type**, then click on the **expense**.



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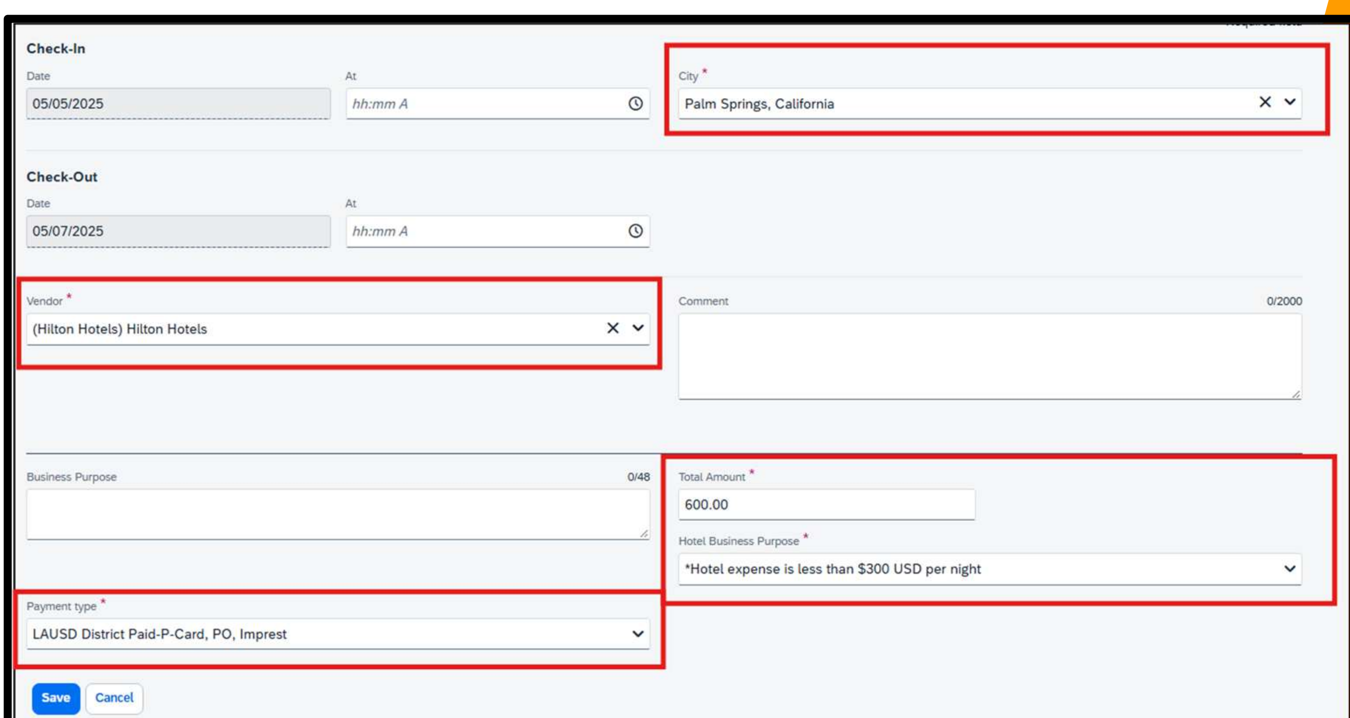
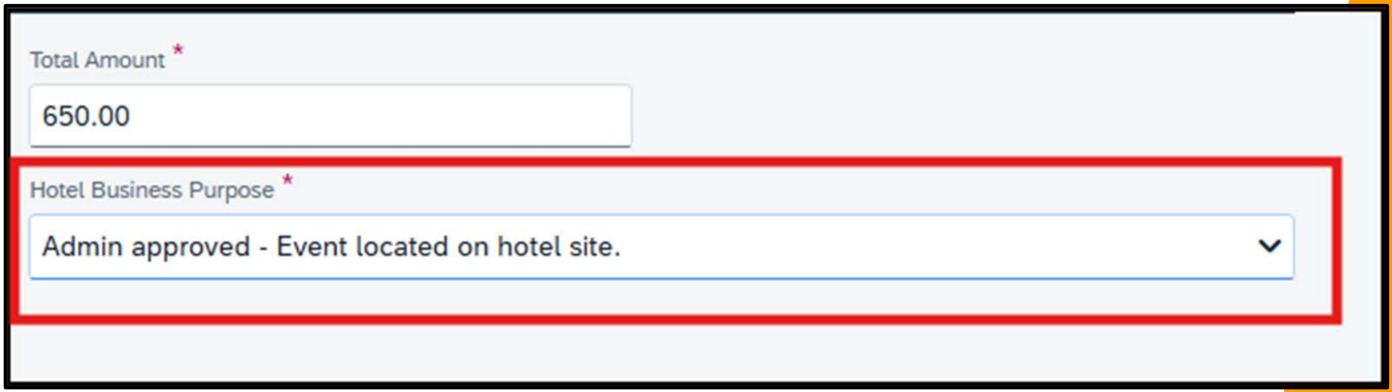
For **Hotel** expense, enter the **Hotel City**, **Hotel Vendor**, **Total Amount**, **Hotel Business Purpose**, and **Payment Type**.



20

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

If your **Total Amount** is **<u>MORE than $400 PER NIGHT</u>**, 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.**

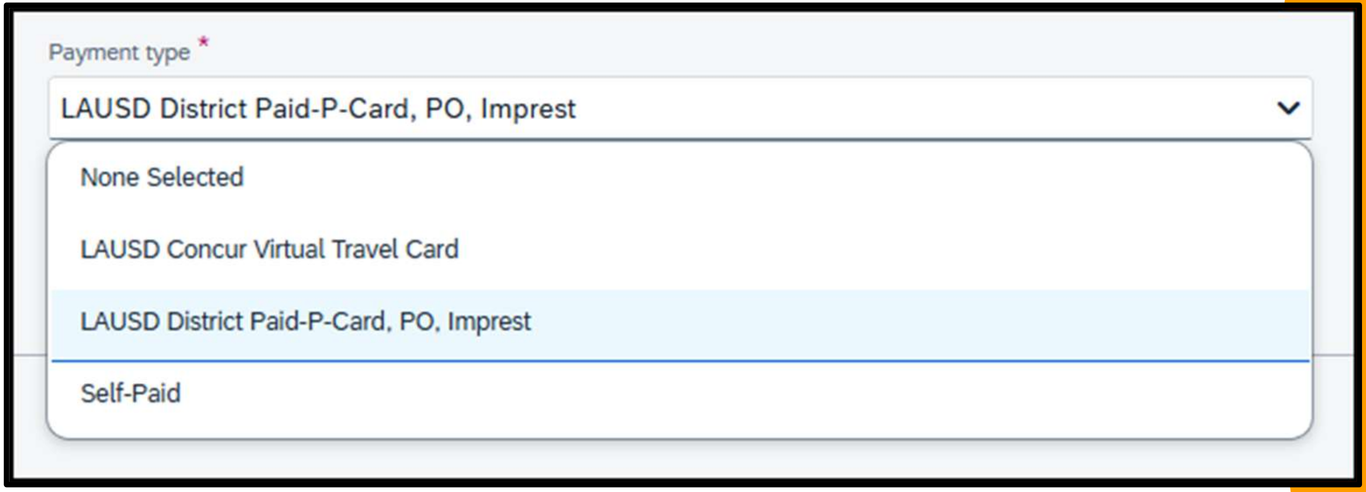


- **LAUSD Concur Virtual Card:** Reserved for booking Hotels or Airfare in Concur using the Concur Booking Tool. Requires the **Booking Type** field in the header to be set to **District-Paid Using Concur Travel Booking**.

- **LAUSD Concur District Paid P-Card, PO**: Hotel expense is paid with your school/office location's P-Card, Purchase Order.

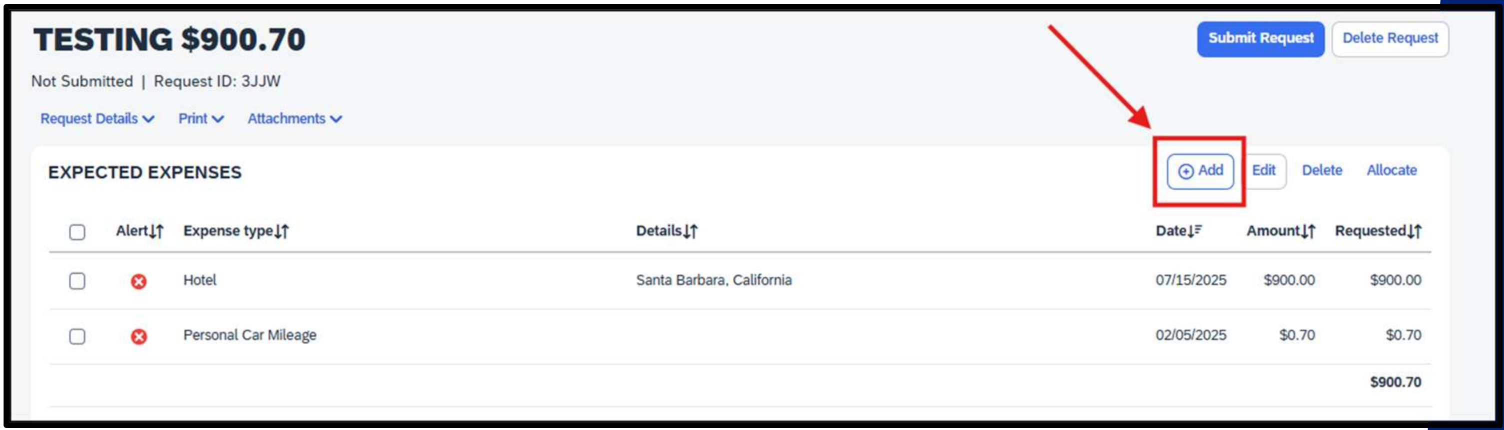
- **Self-Paid**: Traveler pays upfront, receives reimbursement after the trip.

Requests must be approved before making any travel arrangements.



22

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



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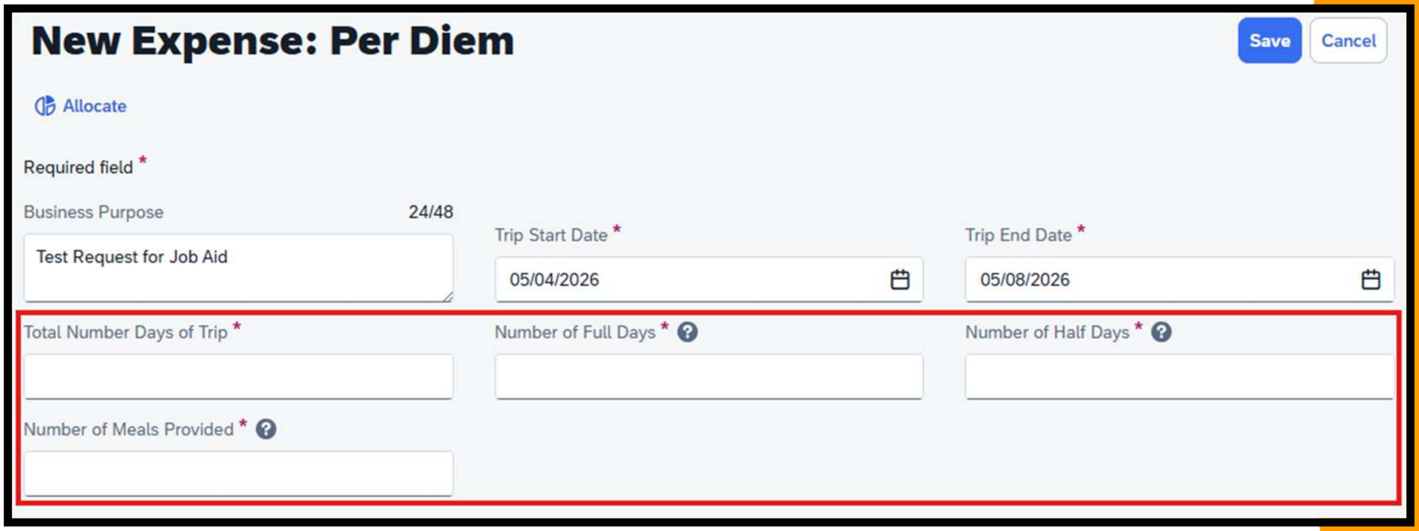
For **Per Diem**, enter the **Total Number Days of Trip**, **Number of Full Days**, **Number of Half Days**, **Number of Meals Provided** (only include lunch and/or dinner provided by third-party vendor). **Total Number Days of Trip** must equal **Number of Full Days** + **Number of Half Days**.



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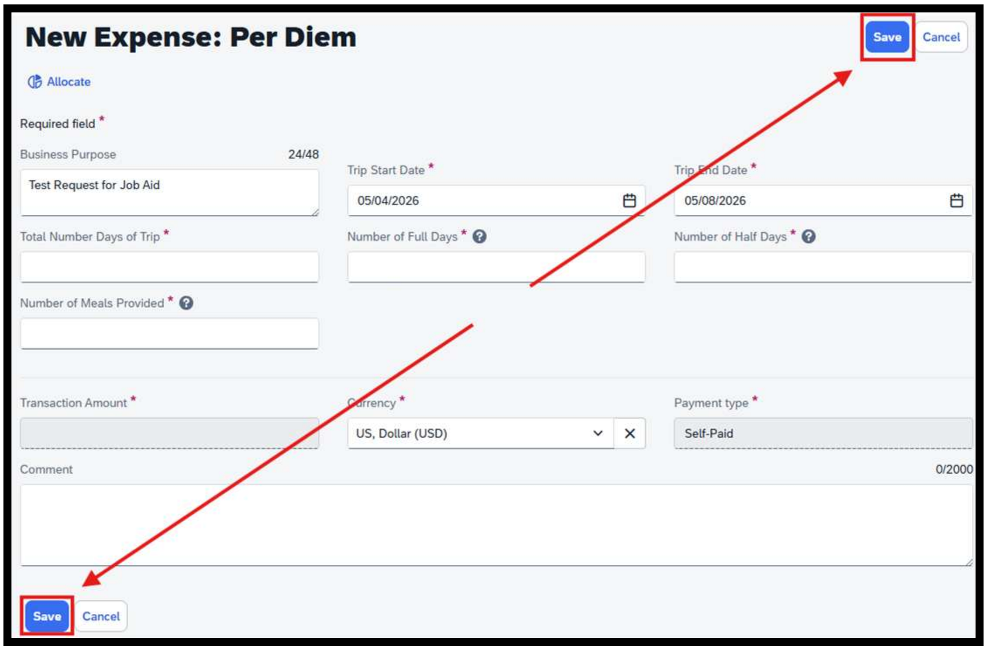
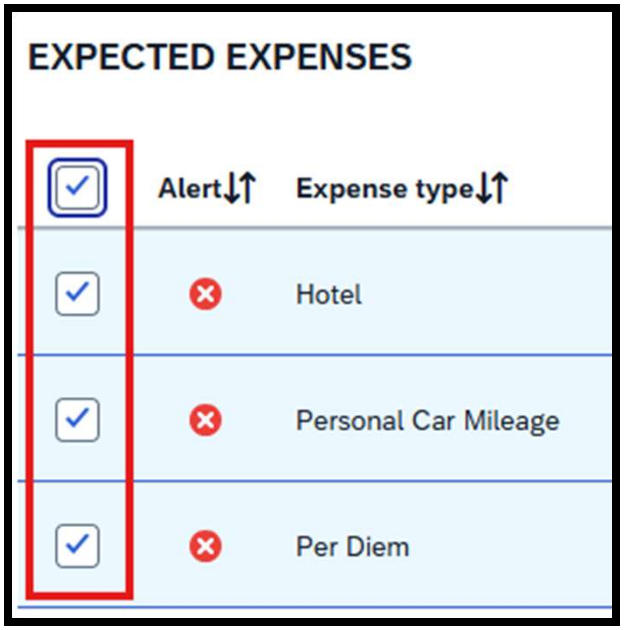
Click **Save**. The **Per Diem** rate will automatically calculate based on the information you provided.



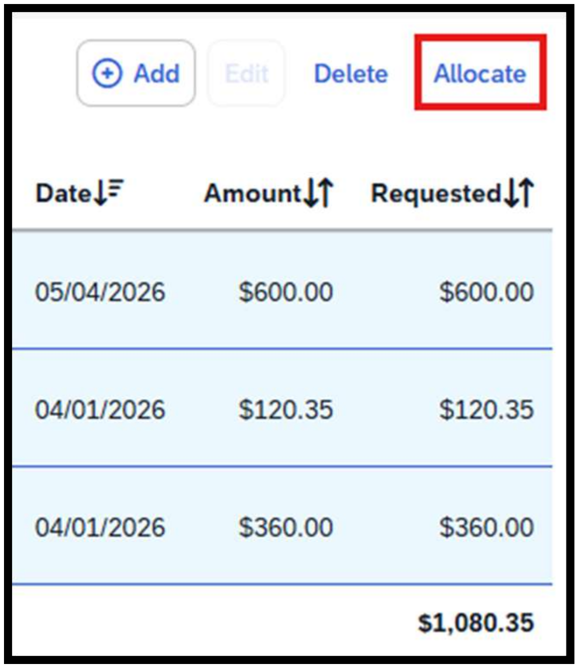
25

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



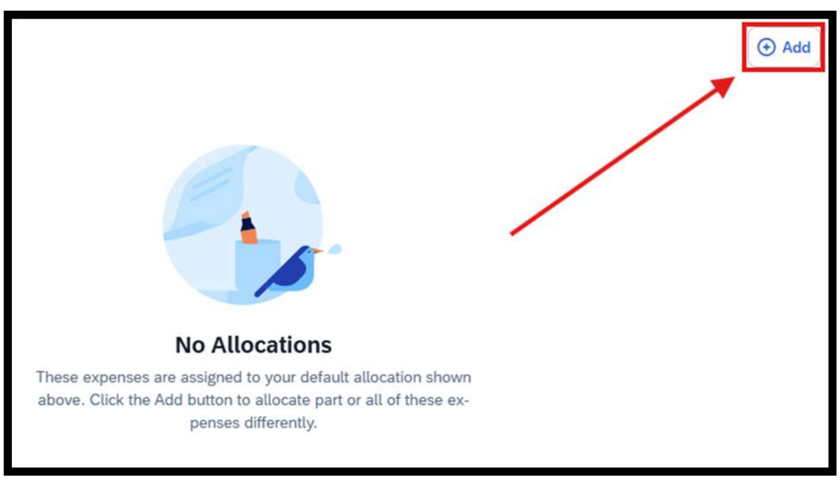
26

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



27

Click **Add**.



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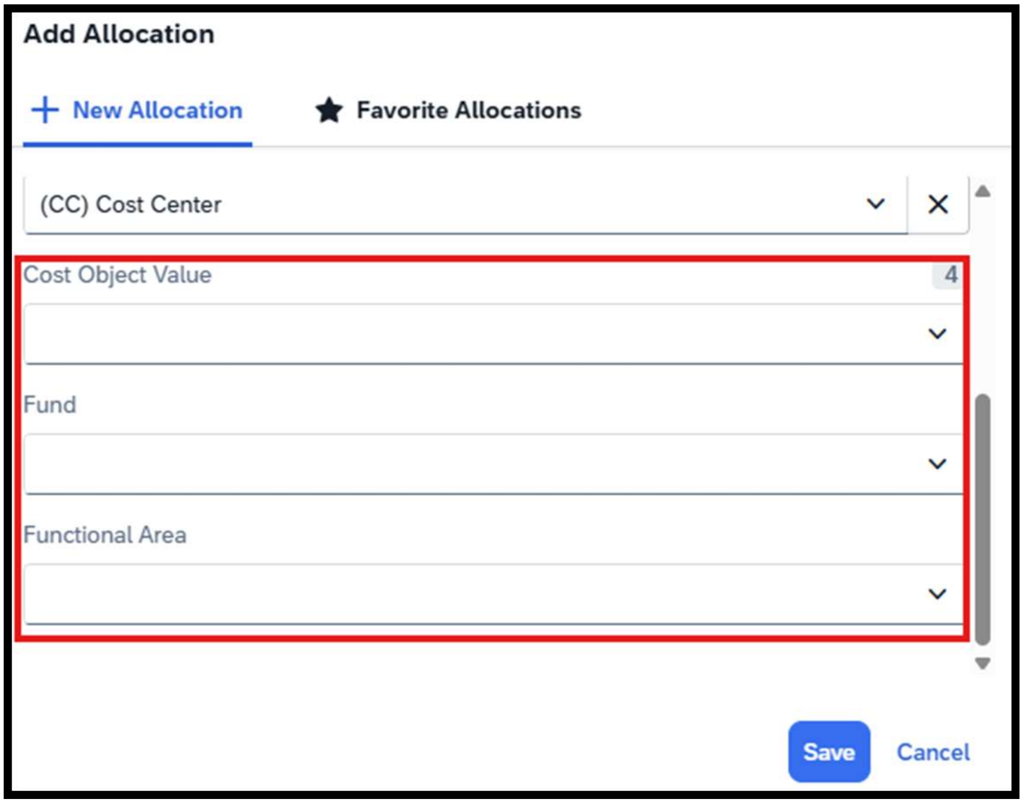
Scroll down to the last three fields (**Cost Object Value, Fund**, and **Functional Area**).



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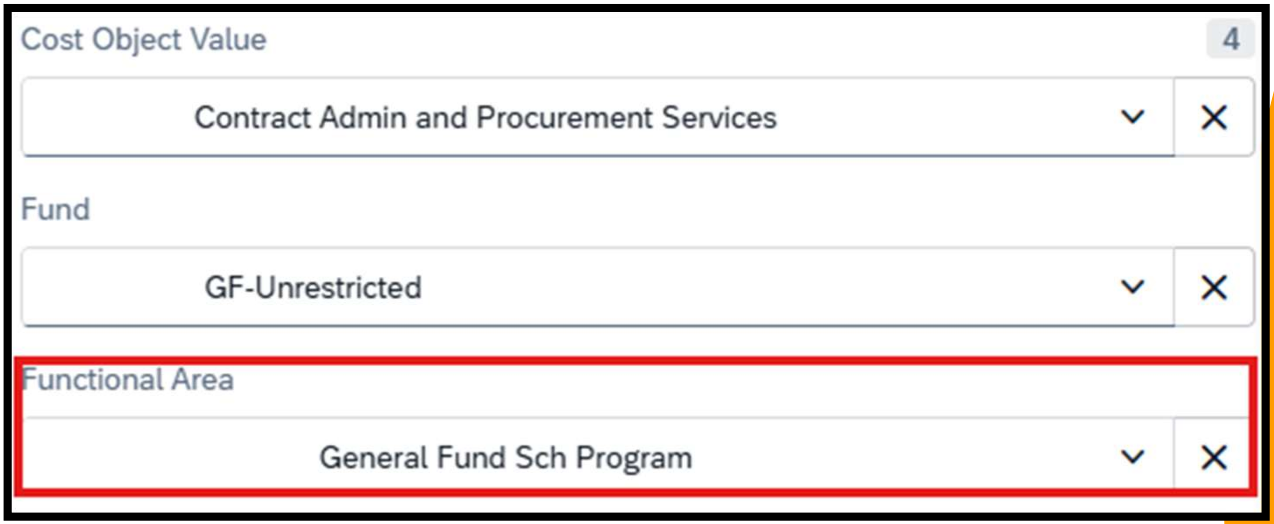
Type the full **funding cost center** number in the **Cost Object Value** field and select it.

30

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

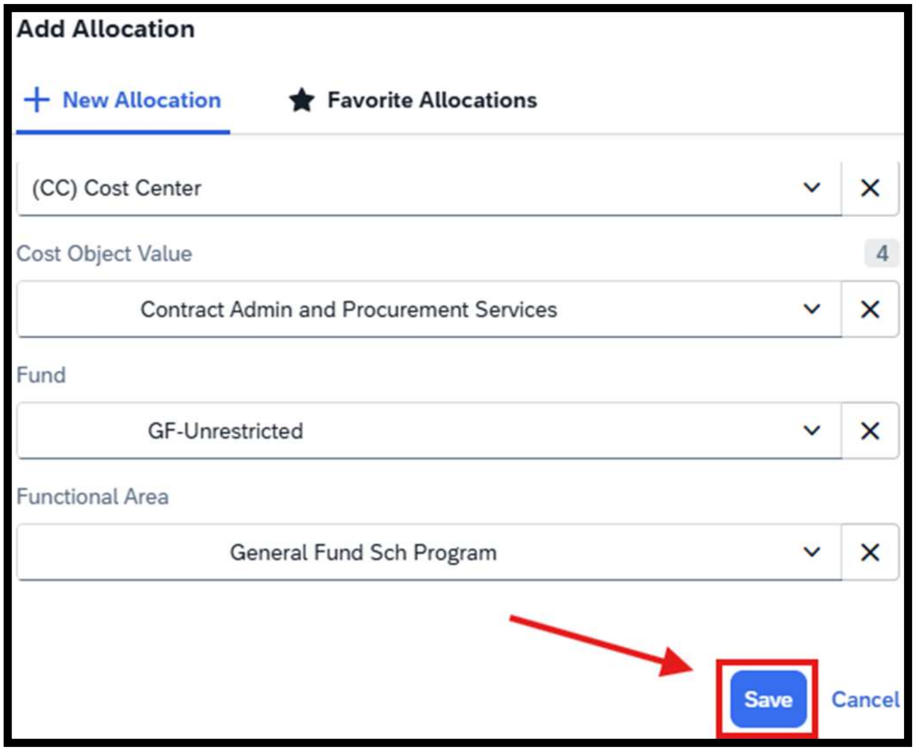
31

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



32

Click **Save**.



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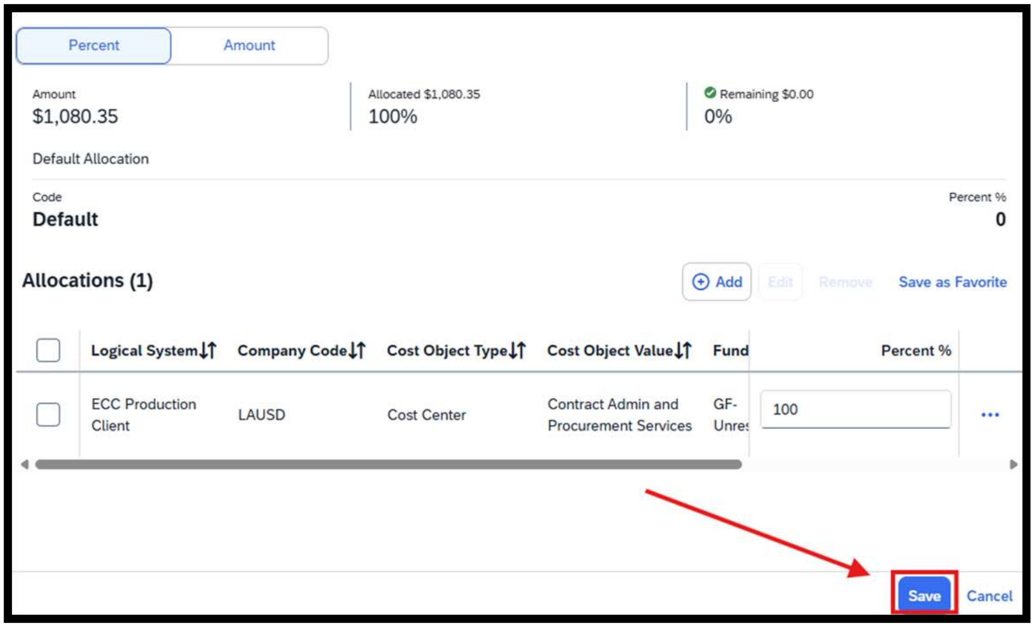
Click **Save** again in the **Allocations window**.



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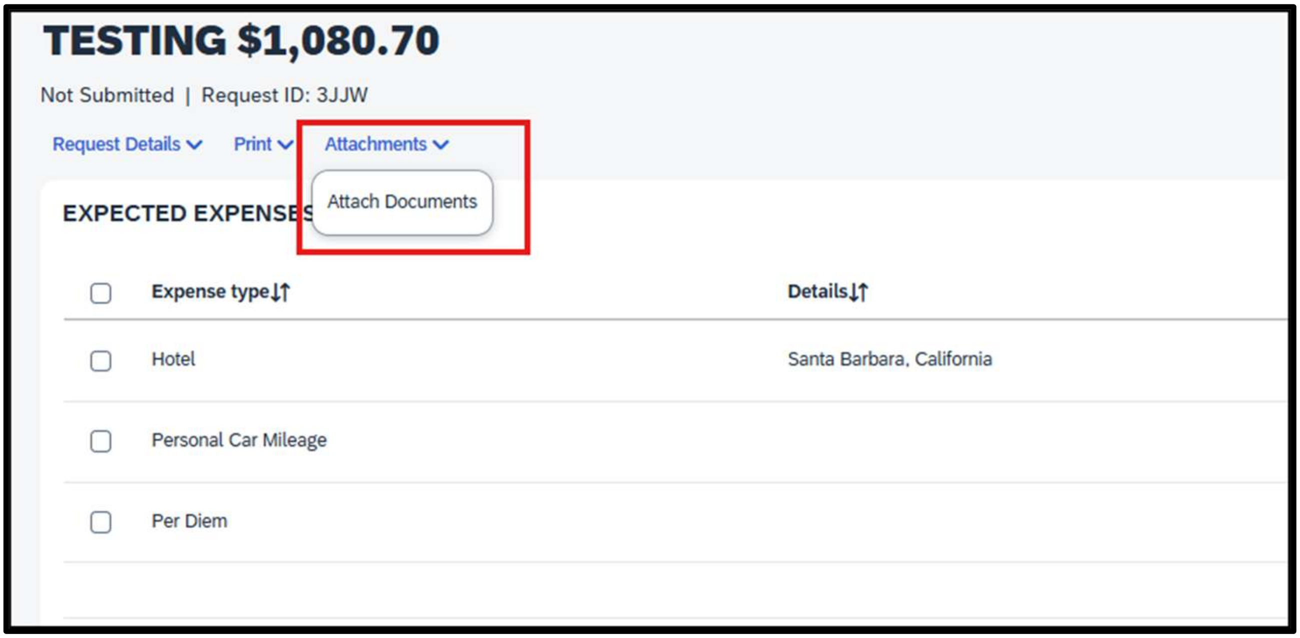
Upload the required documents. Click **Attachments → Attach Documents**.



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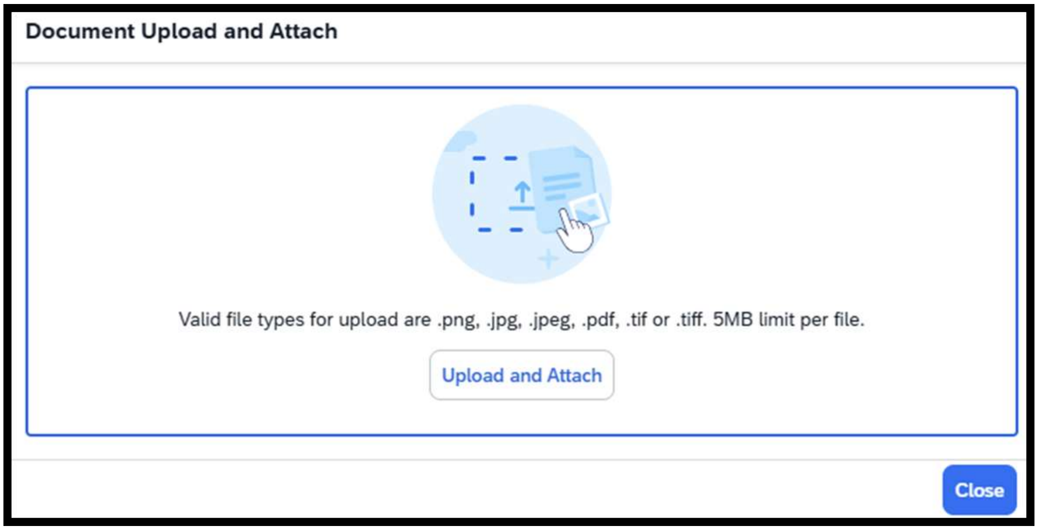
You can drag & drop the document in the box or click on **Upload and Attach** to search for & attach your file.



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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.

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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

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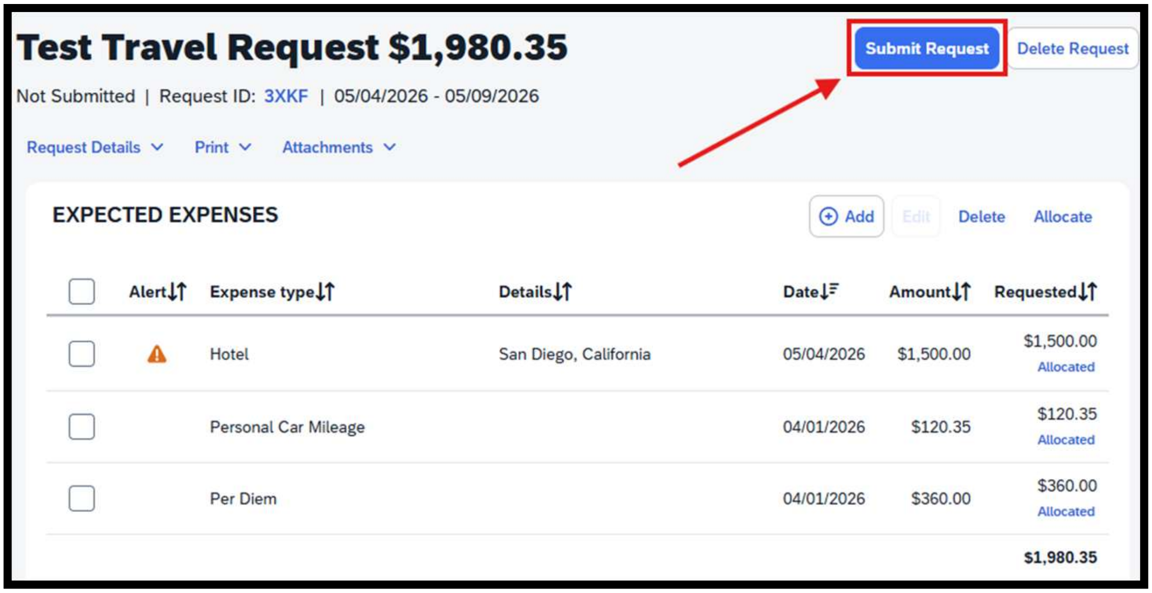
Click **Submit Request** to submit the request for approval.



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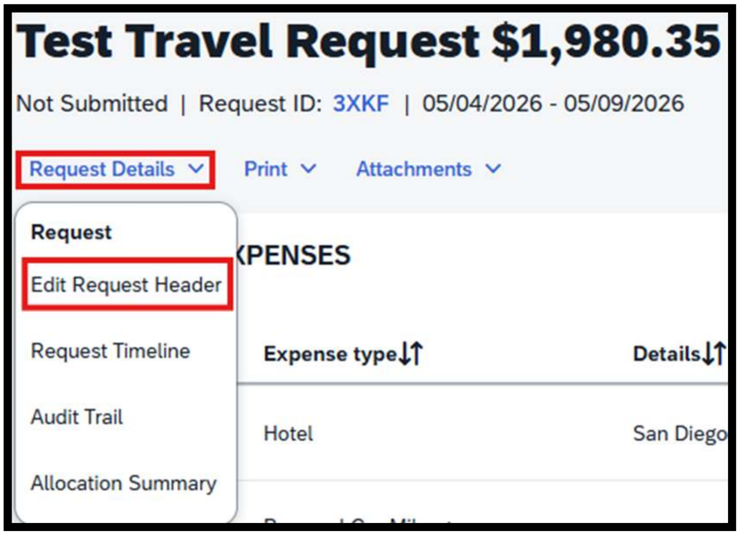
If the **request** goes through **budget check** successfully, the system will indicate who the request is **pending with**. Budget check should take 2-5 minutes. Go to **Request Details → Edit request Header.**



40

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