LAUSD UNIFIED

# SAP Concur

**PROCUREMENT SERVICES DIVISION**

## End-USER Training

How to Submit a Travel Request

# The purpose of this job aid is to show how to submit a travel request in Concur.

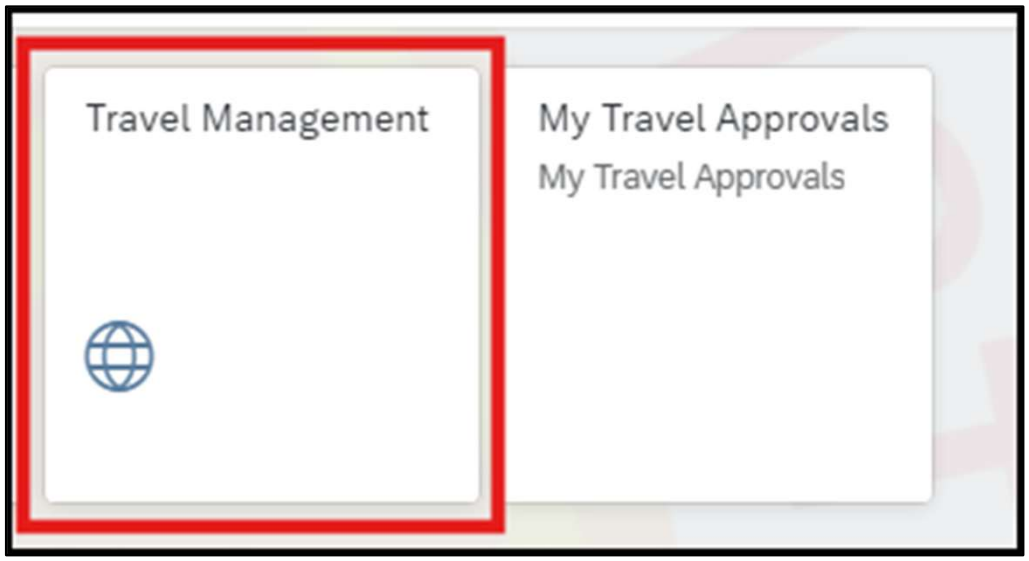
**1**

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



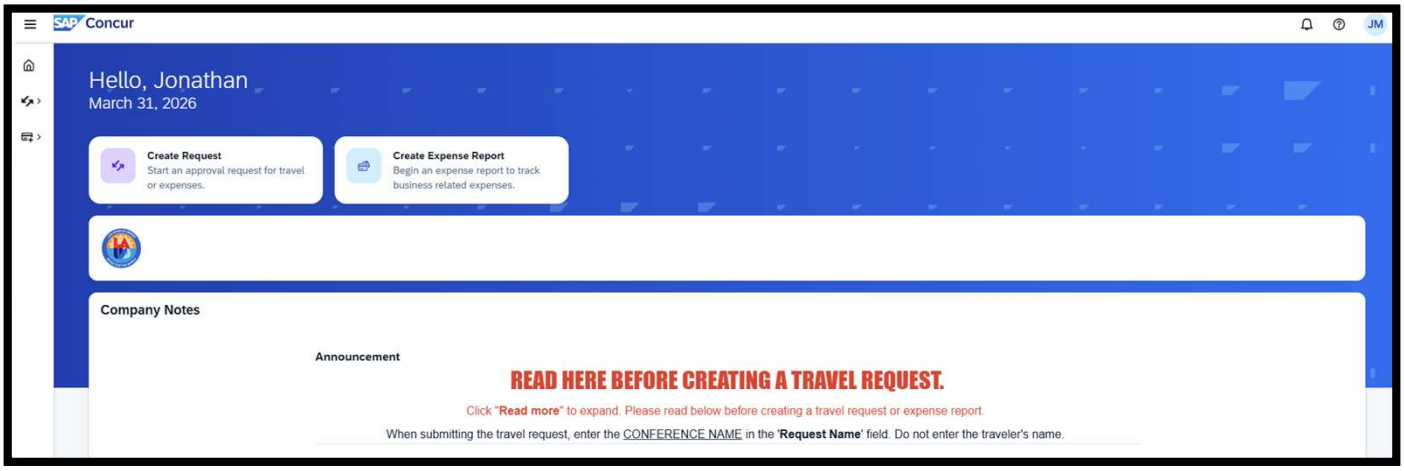

**2**

Click on the **Travel Management** tile.



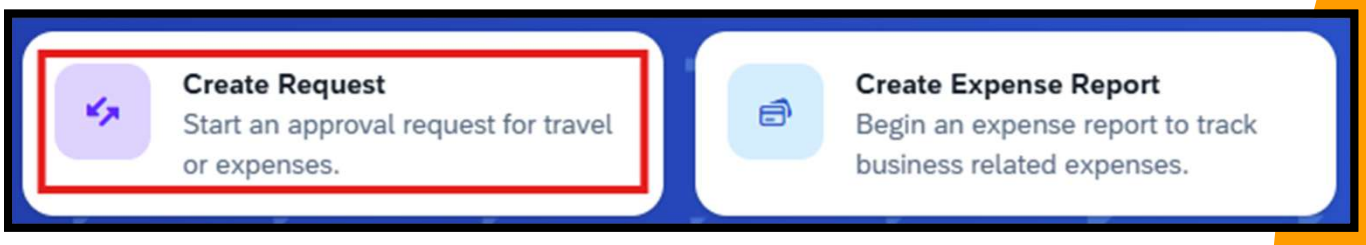
**3**

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



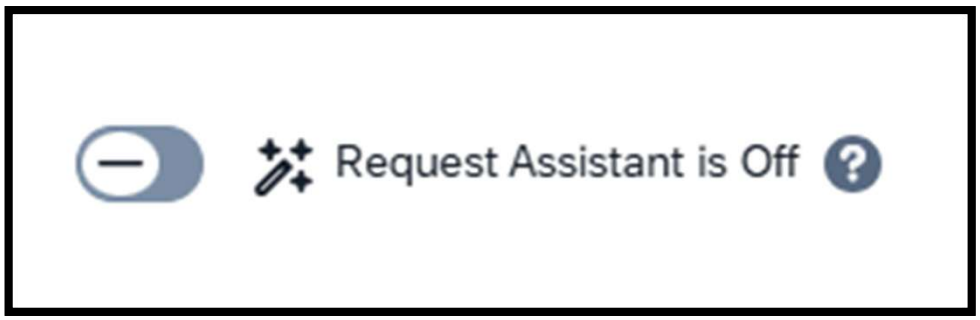

**4**

Click **Create Request**.



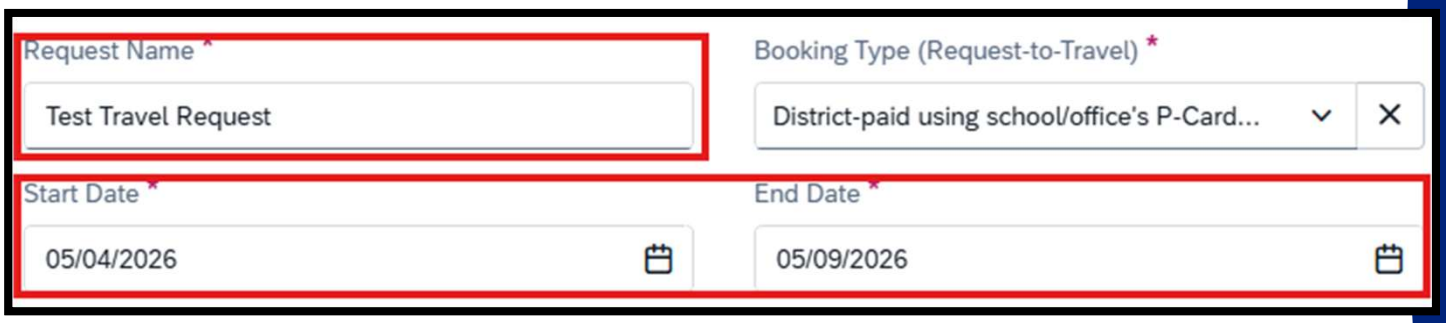
5

**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.



6

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



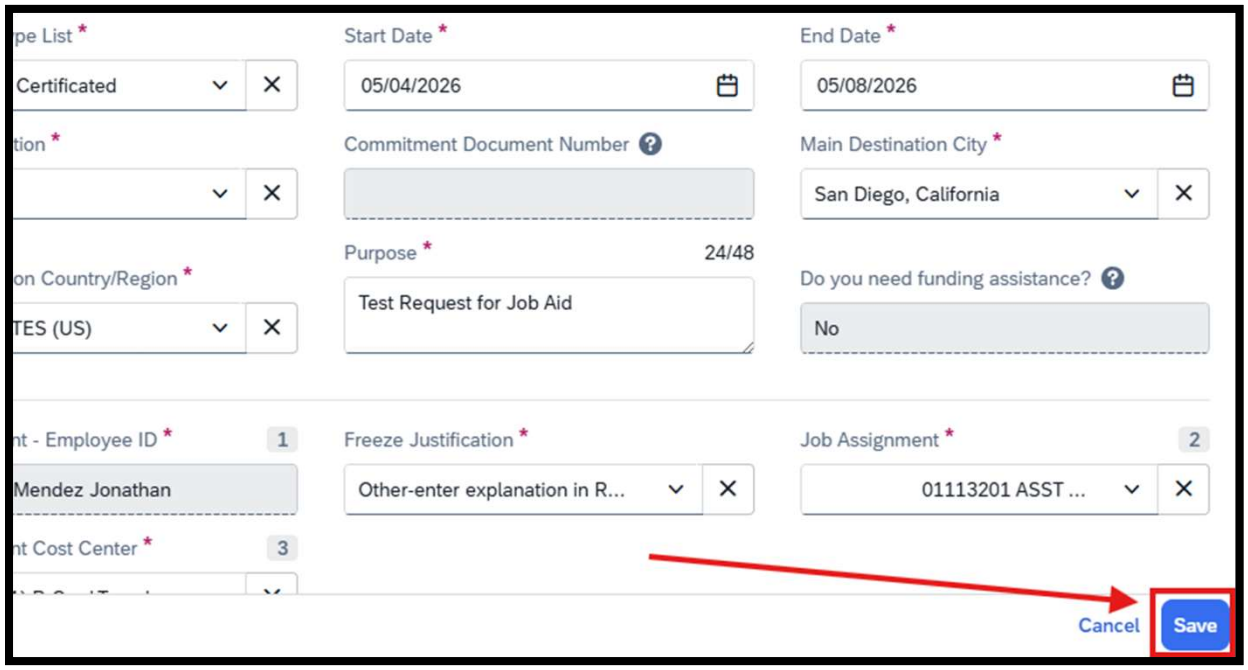

7

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.



**8**

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



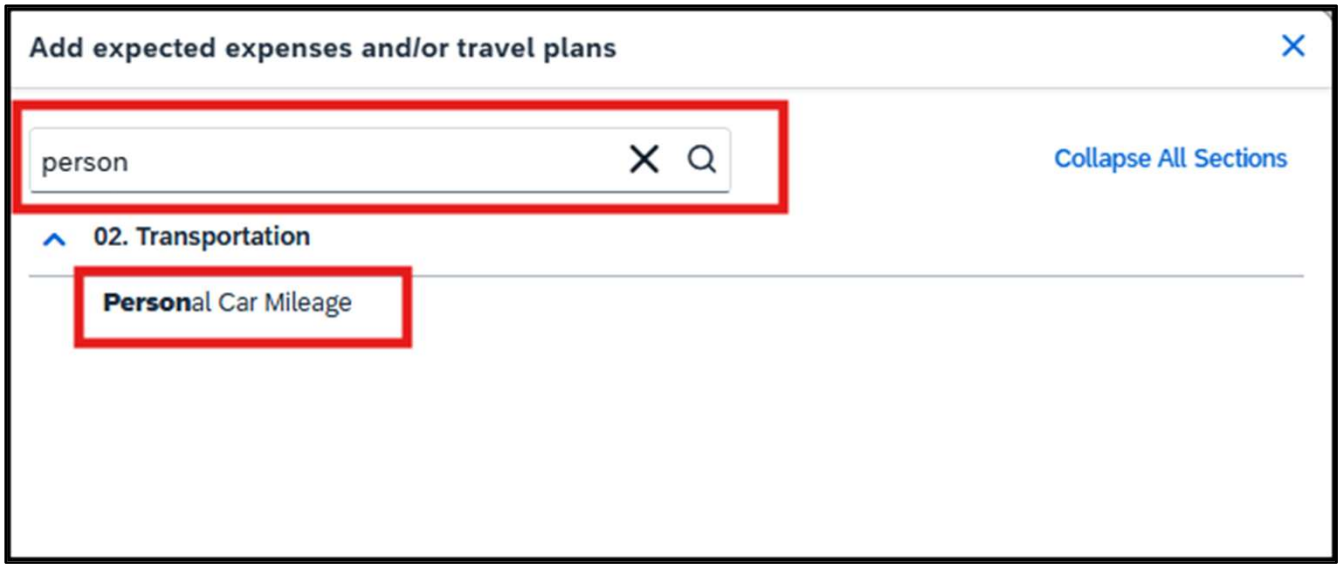

**9**

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



**10**

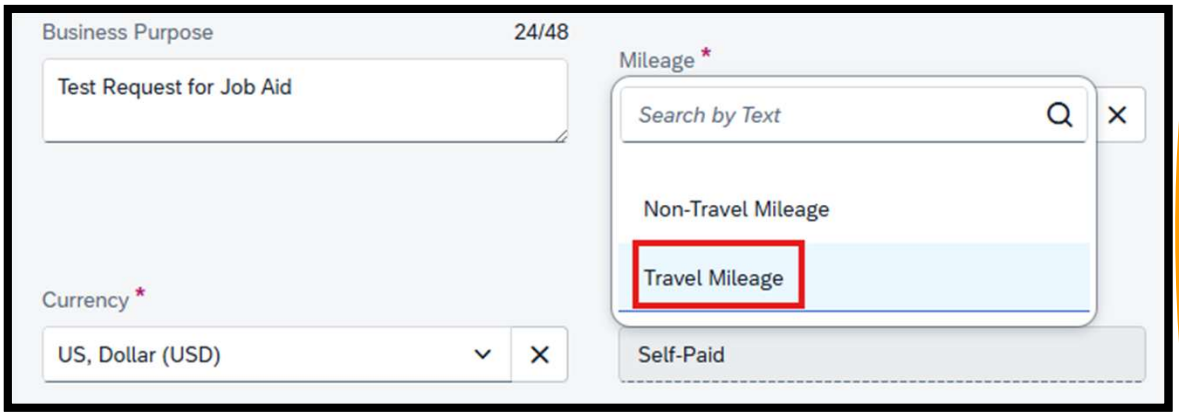
Search for your desired **Expense Type**, then click on the **expense**.




**11**

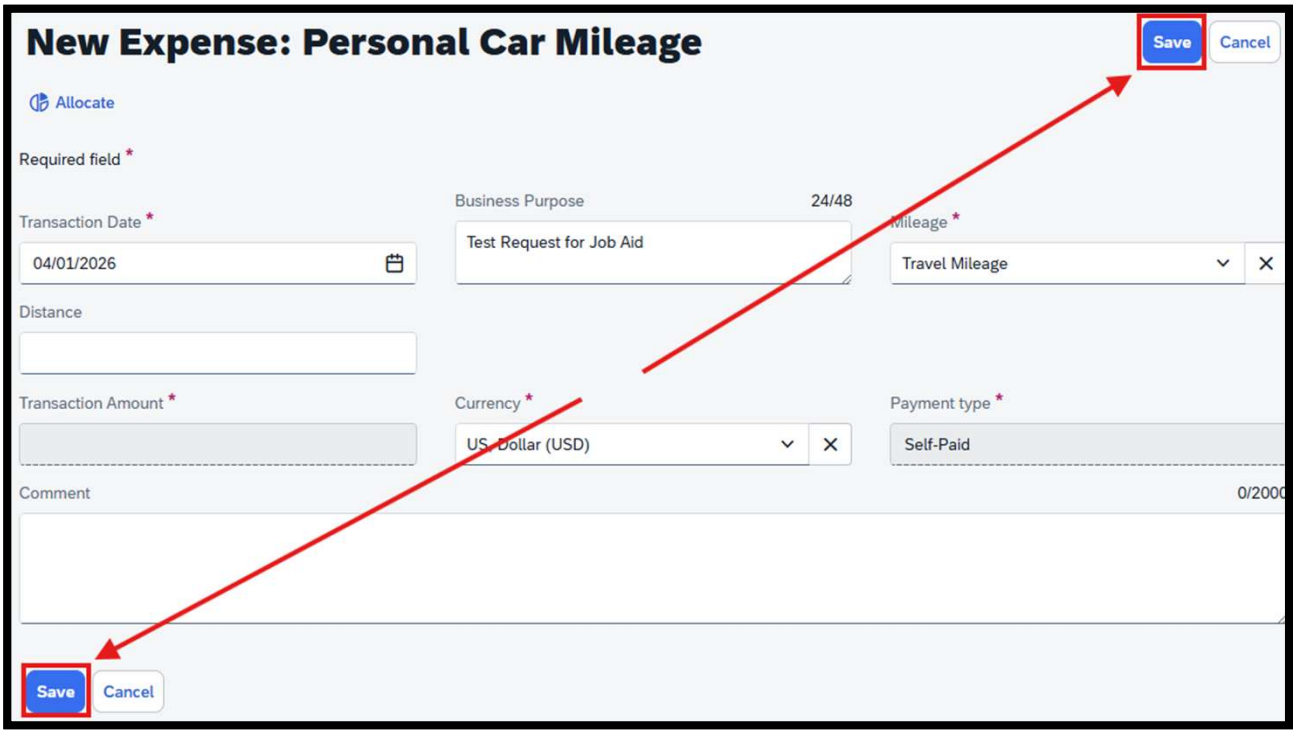
For Personal Car Mileage, select **Travel Mileage** and add the total distance for the whole duration of the trip.

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



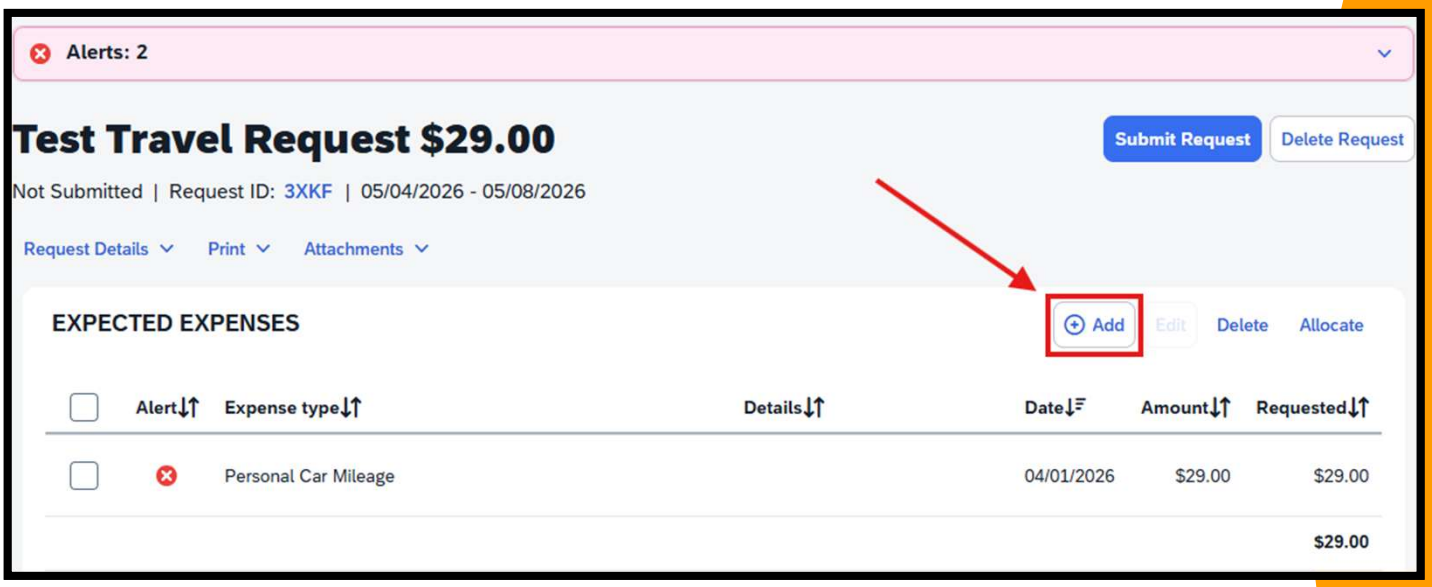
**12**

Click **Save**.



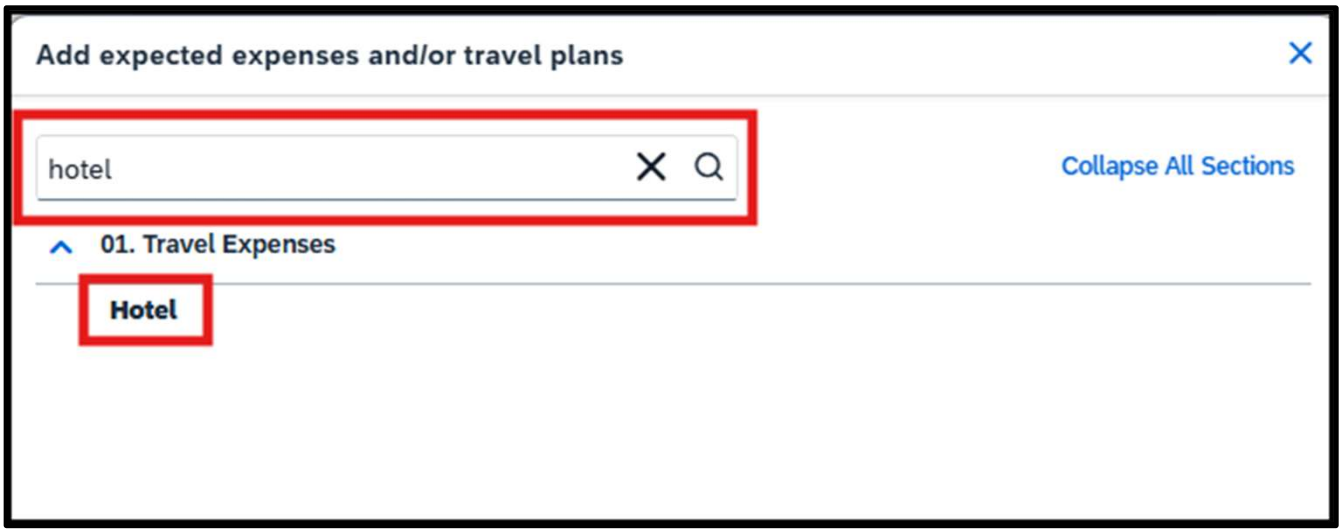

**13**

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



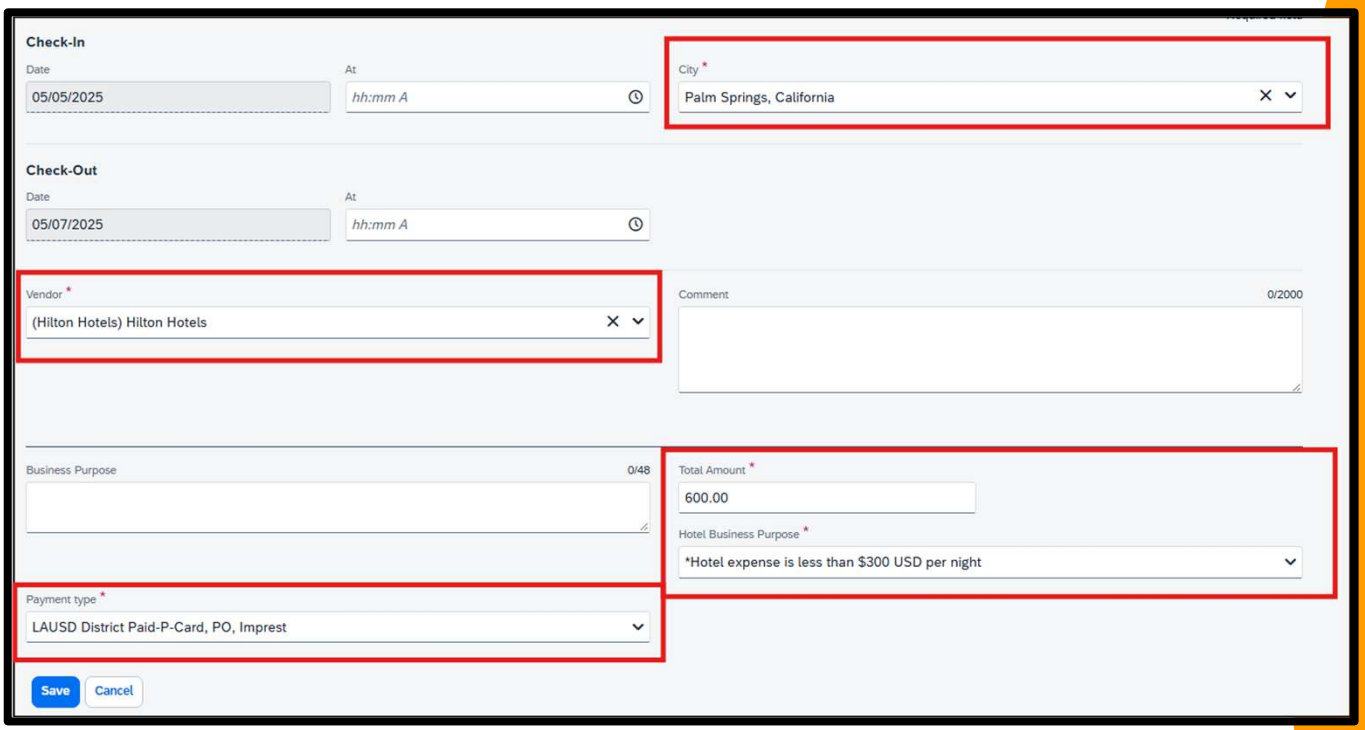
**14**

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




**15**

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

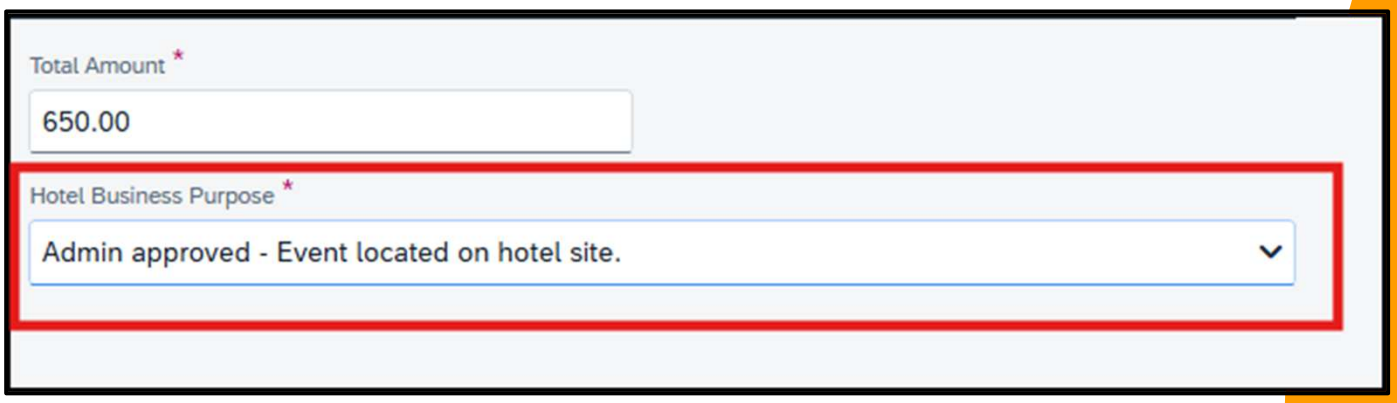


16

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




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.**

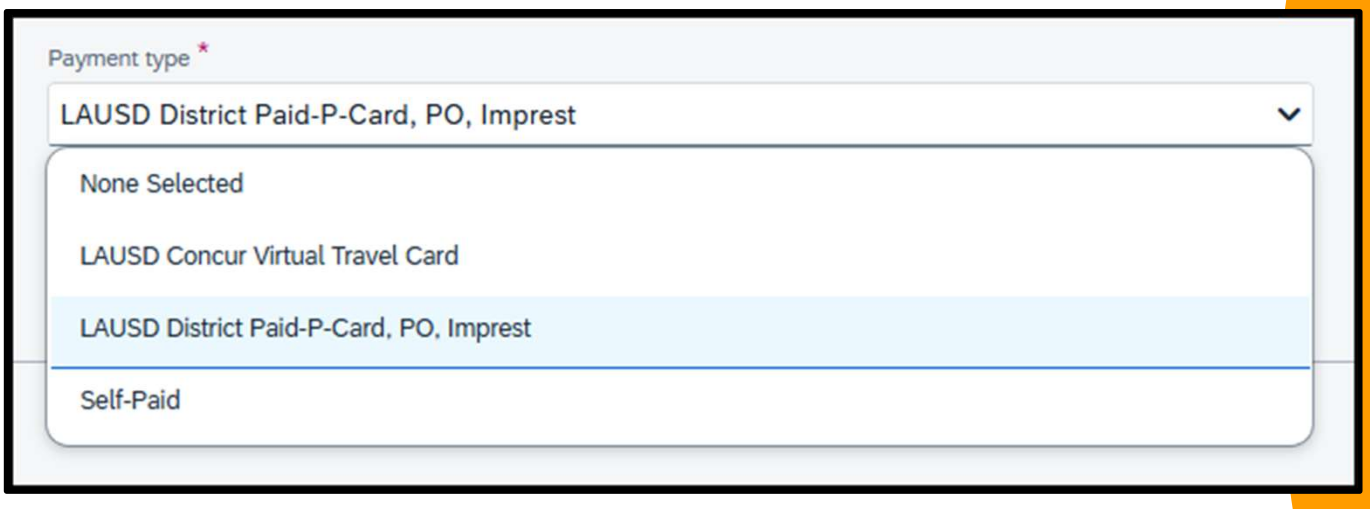


- **LAUSD Concur Virtual Card:** Reserved for booking Hotels or Airfare in Concur using the Concur Booking Tool. Requires the **Booking Type** field in the header to be set to **District-Paid Using Concur Travel Booking**.

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

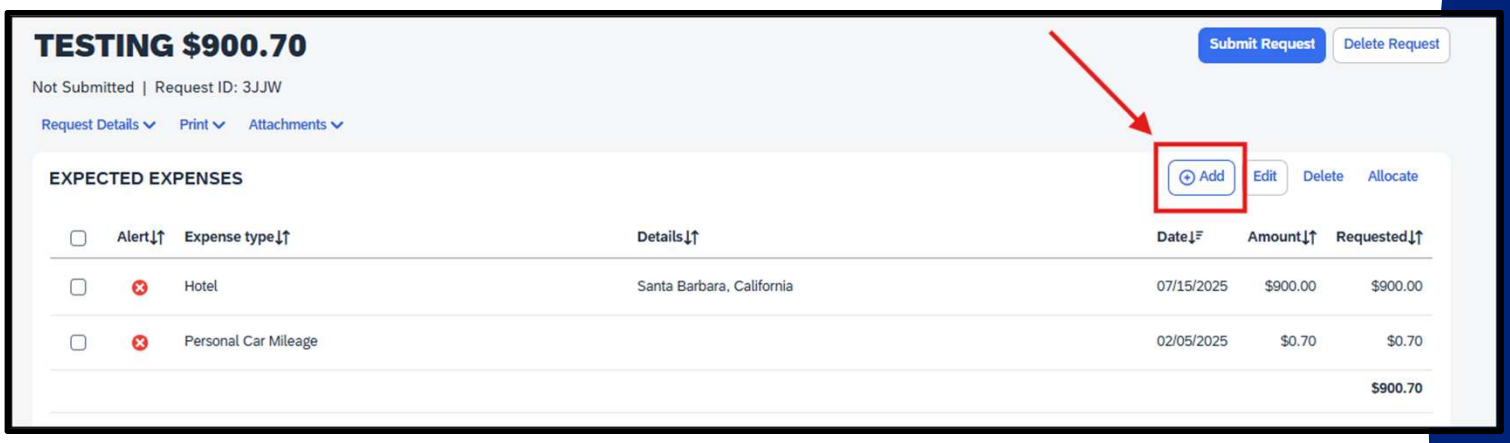
- **Self-Paid**: Traveler pays upfront, receives reimbursement after the trip.

Requests must be approved before making any travel arrangements.



**18**

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



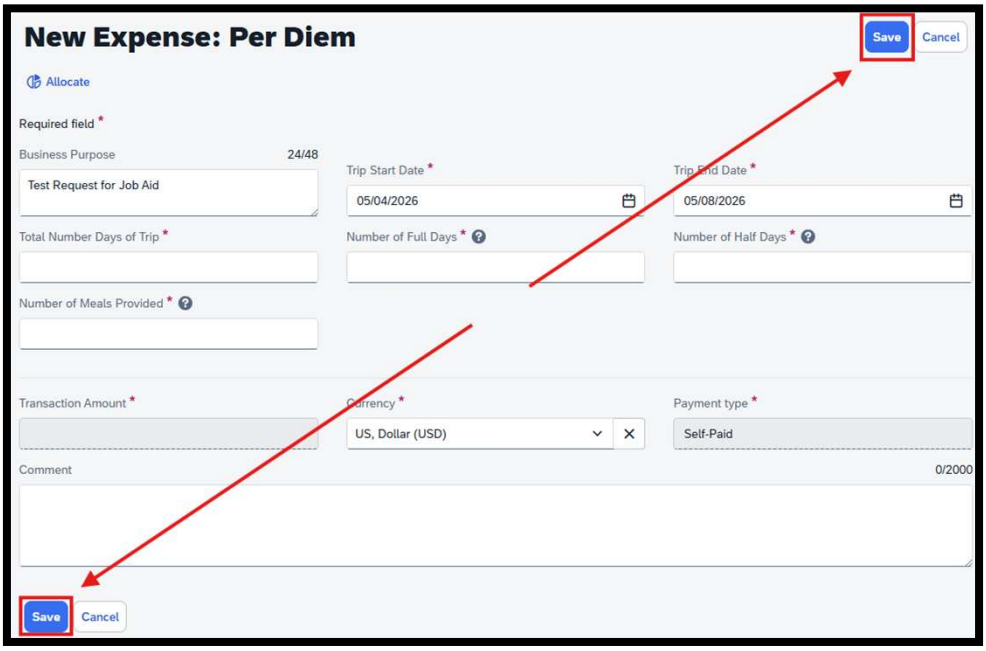

**19**

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**.



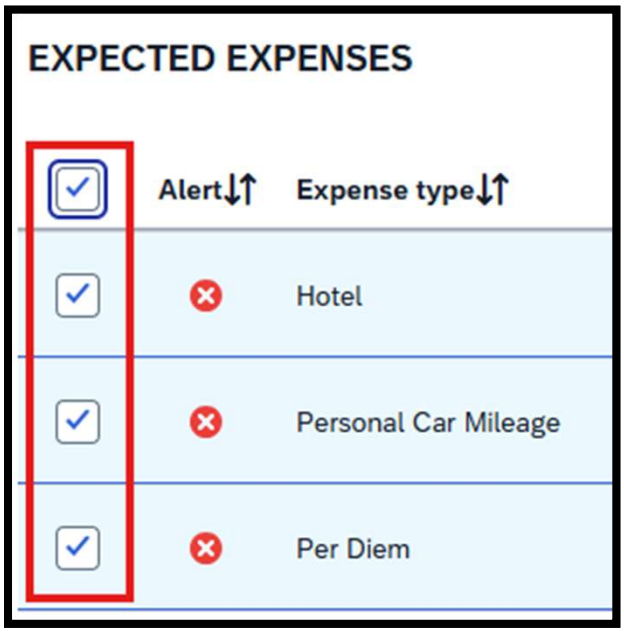
**20**

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



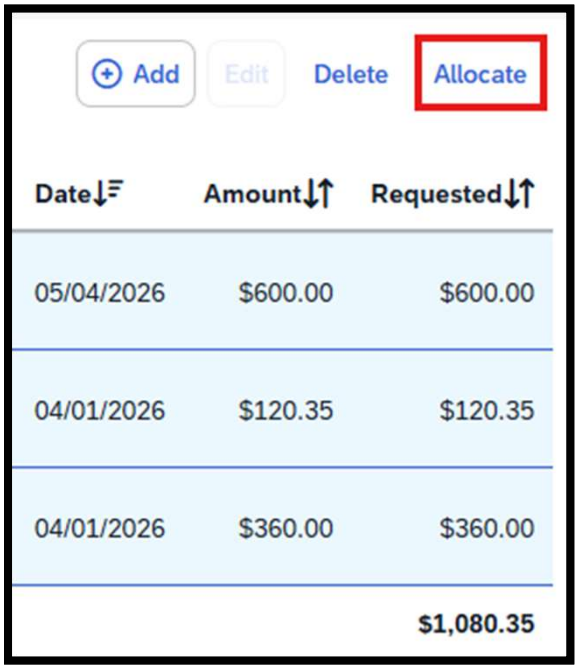

**21**

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



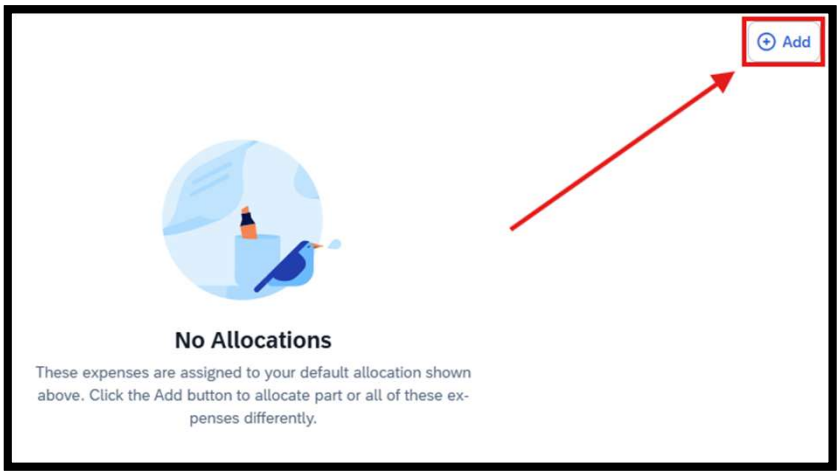
**22**

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



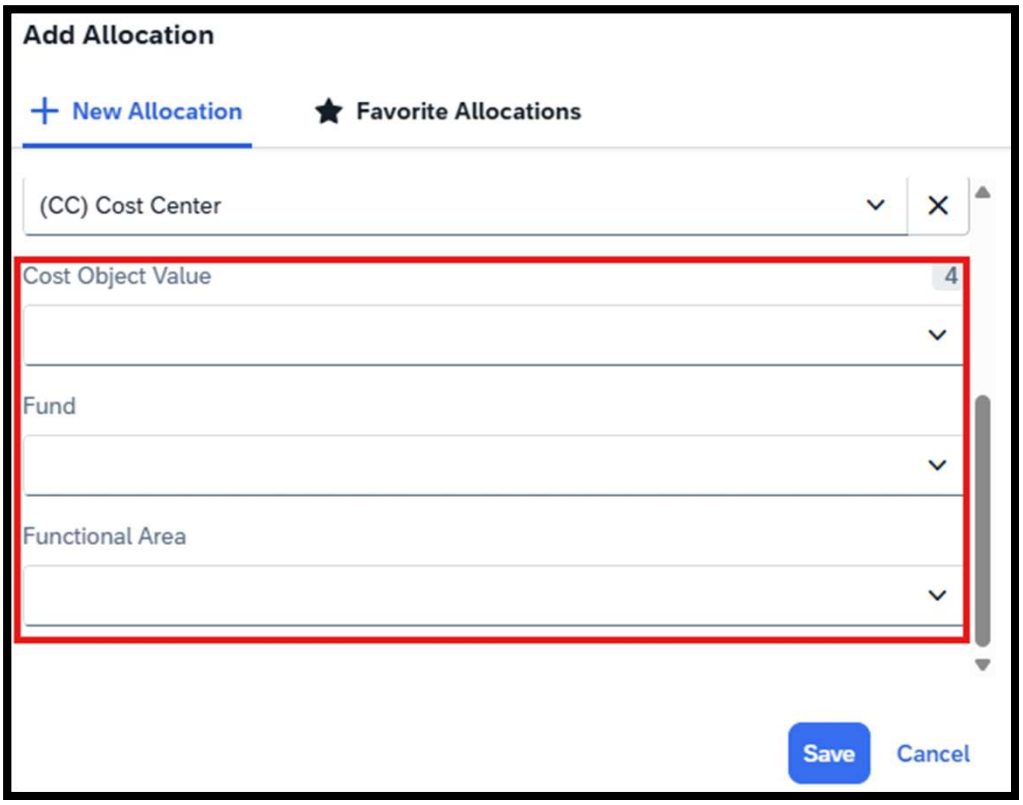

**23**

Click **Add**.



**24**

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




**25**

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



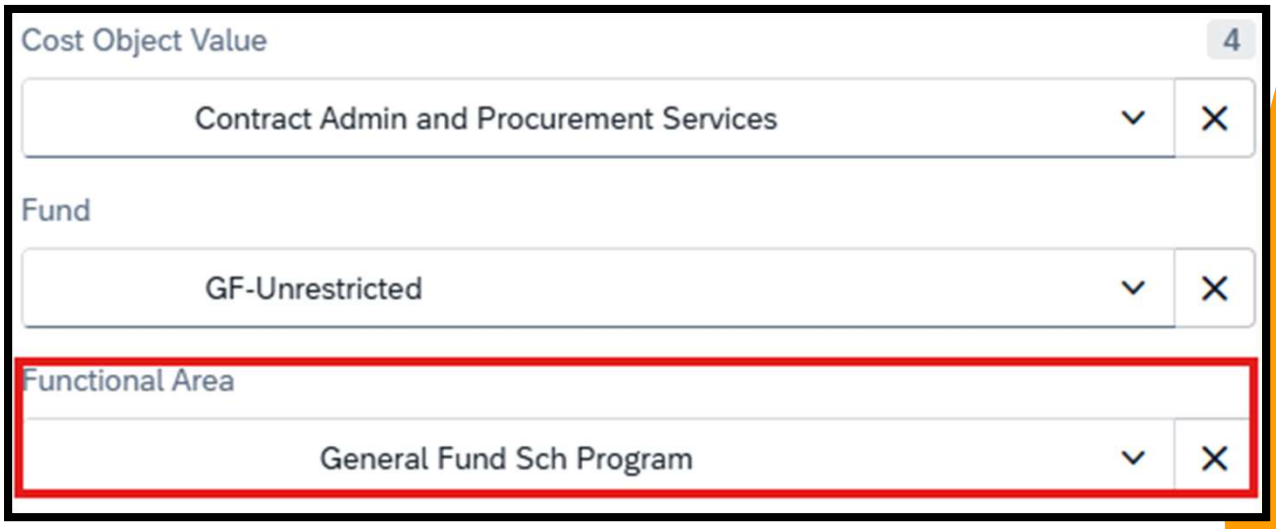
**26**

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



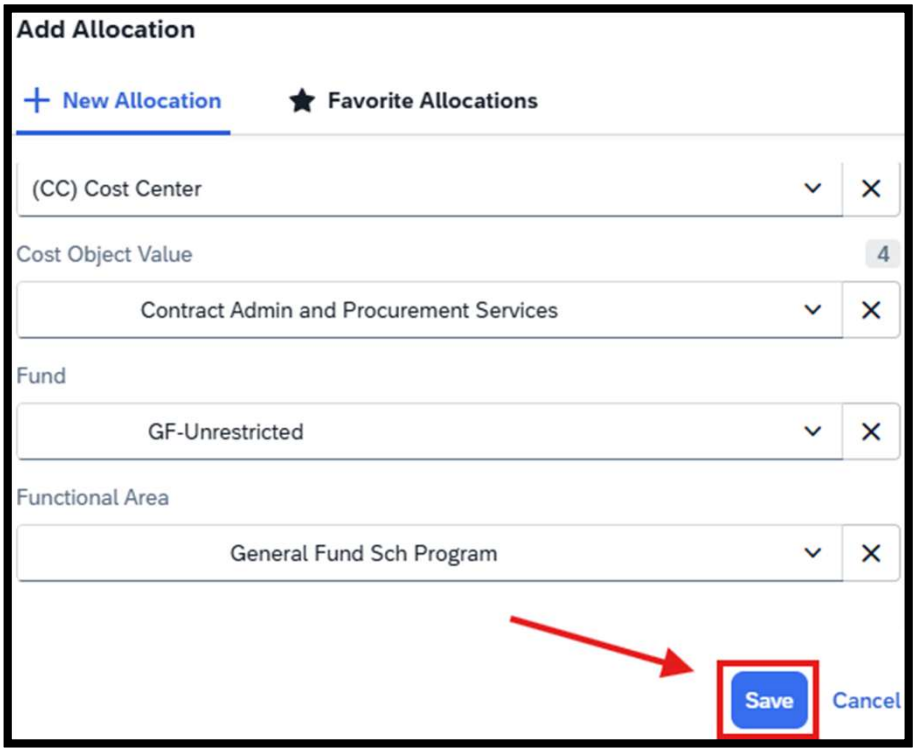

**27**

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



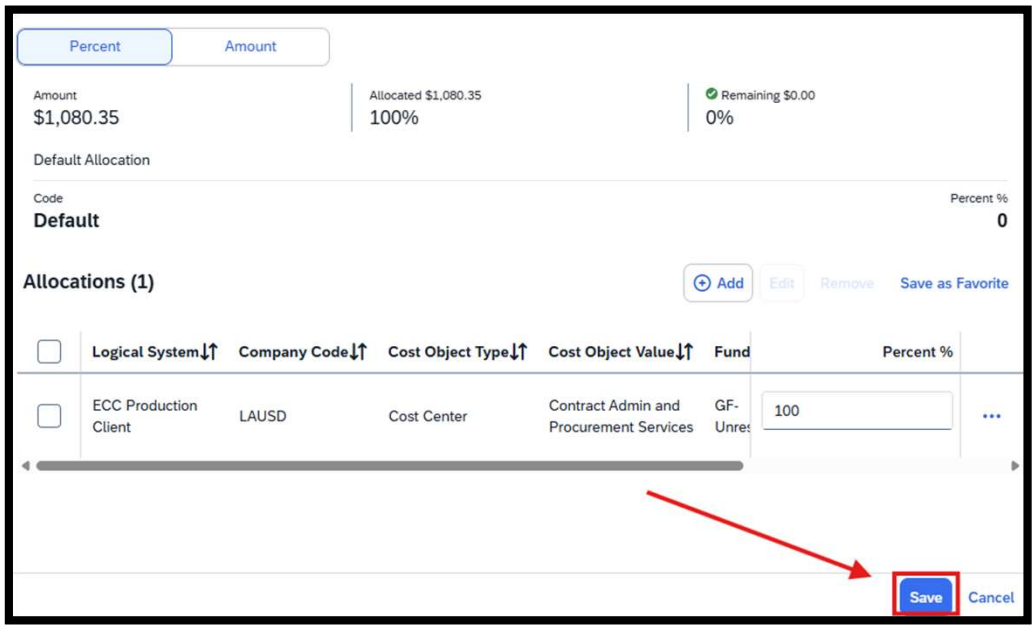
**28**

Click **Save**.



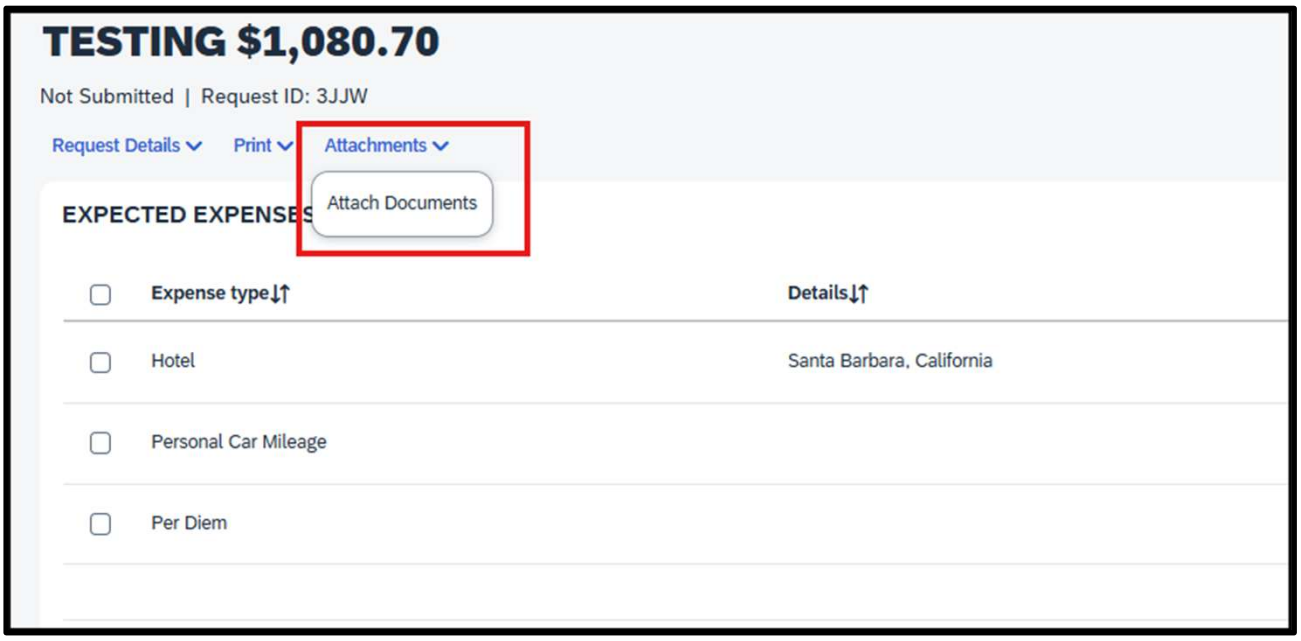

**29**

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



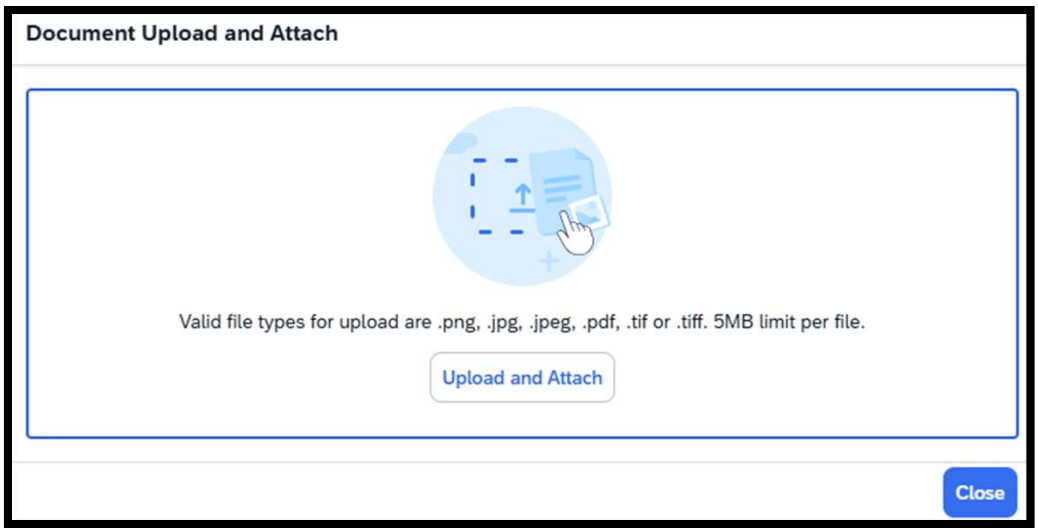
**30**

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




**31**

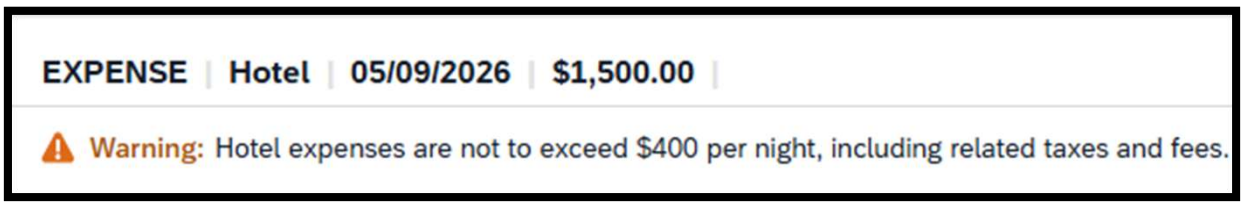
You can drag & drop the document in the box or click on **Upload and Attach** to search for & attach your file.



32

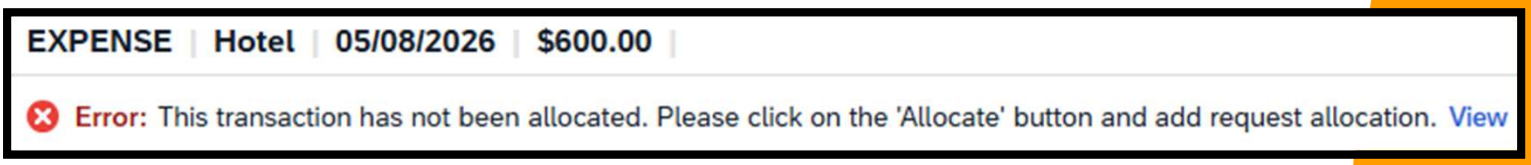
**Yellow Warning Signs** will not prohibit you from submitting your **request**.



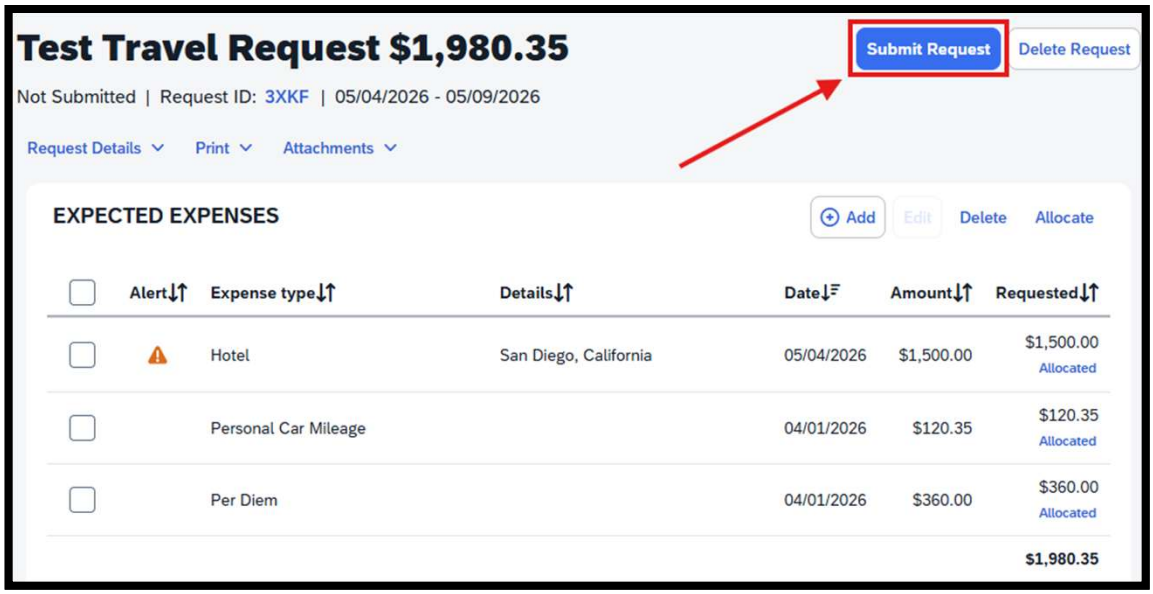

33

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



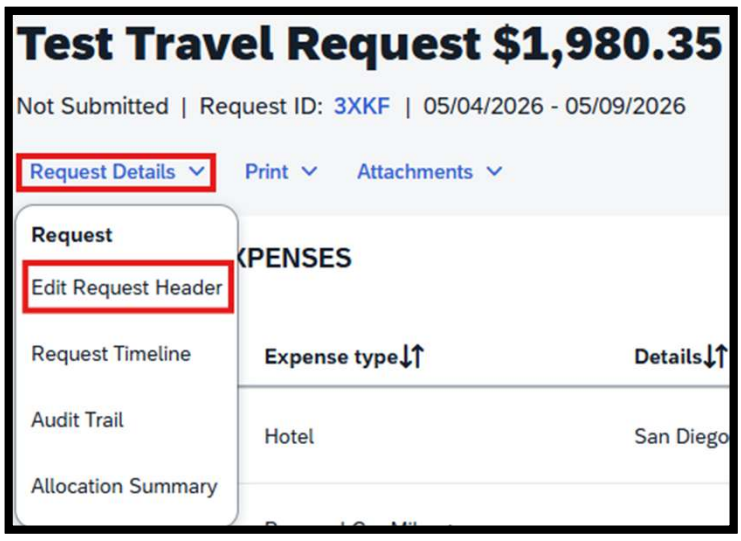
**34**

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



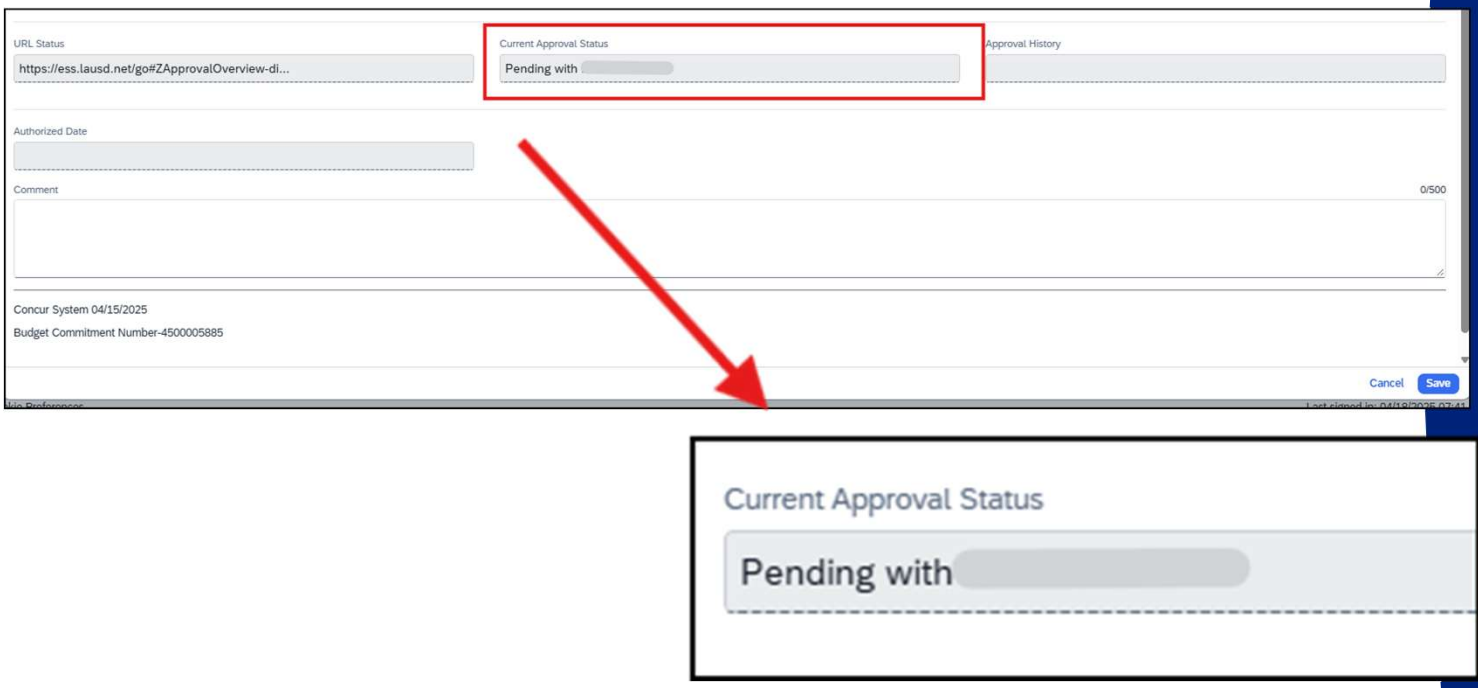

**35**

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.**



36

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




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