

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.

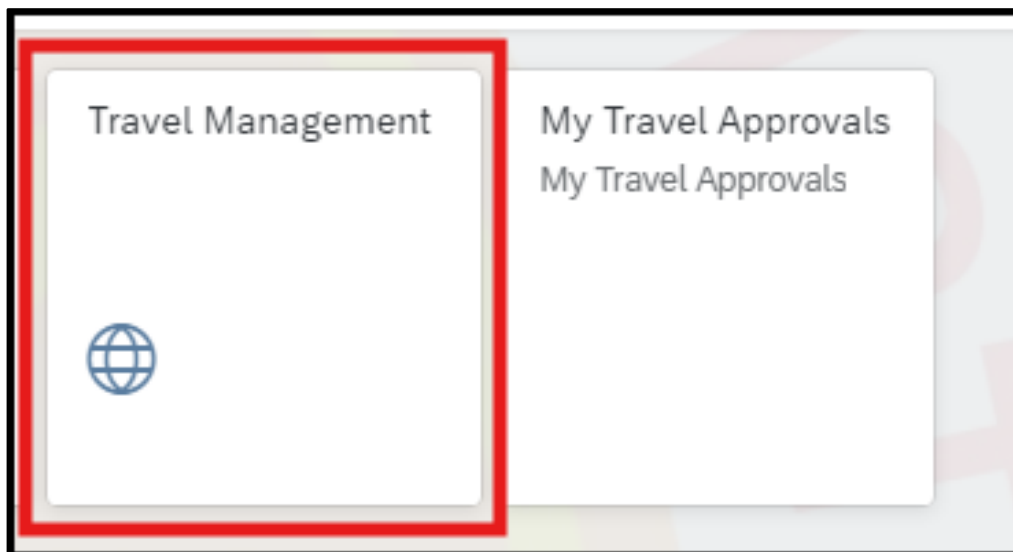
1

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



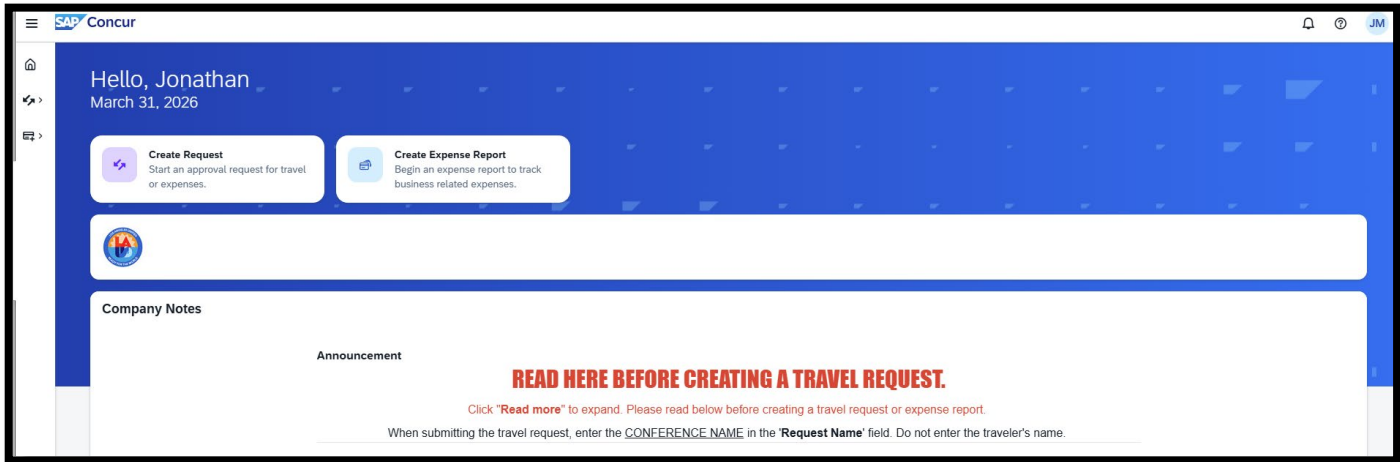
2

Click on the **Travel Management** tile.



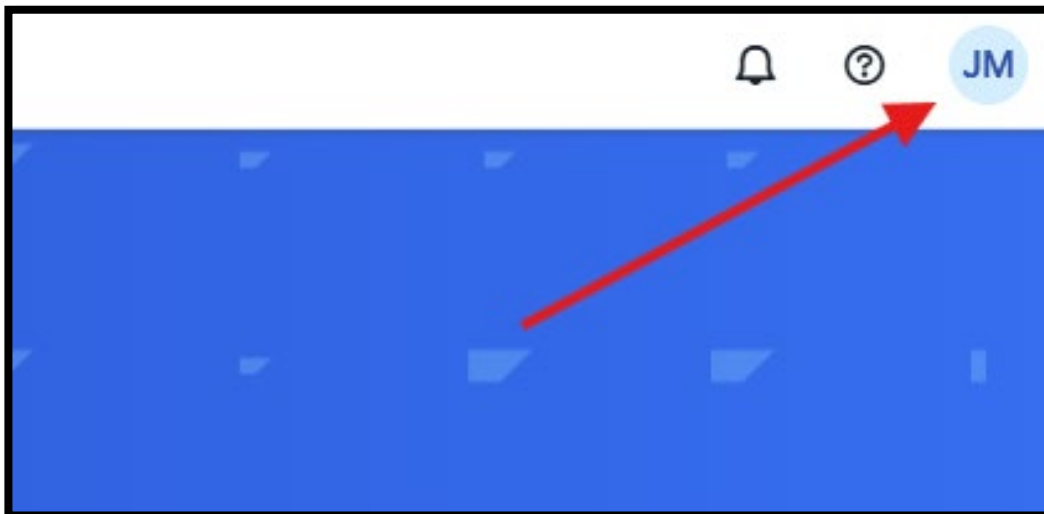
3

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



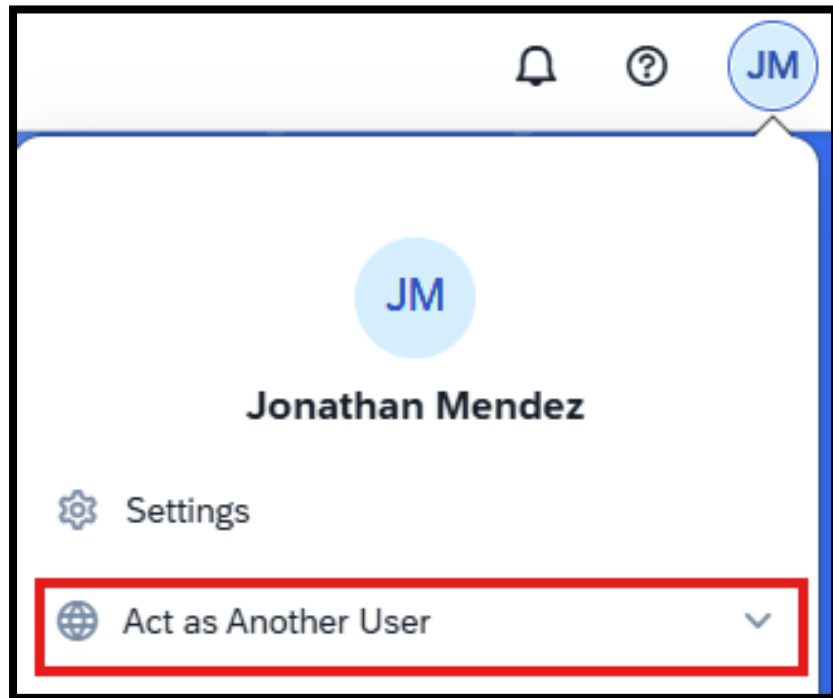
4

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



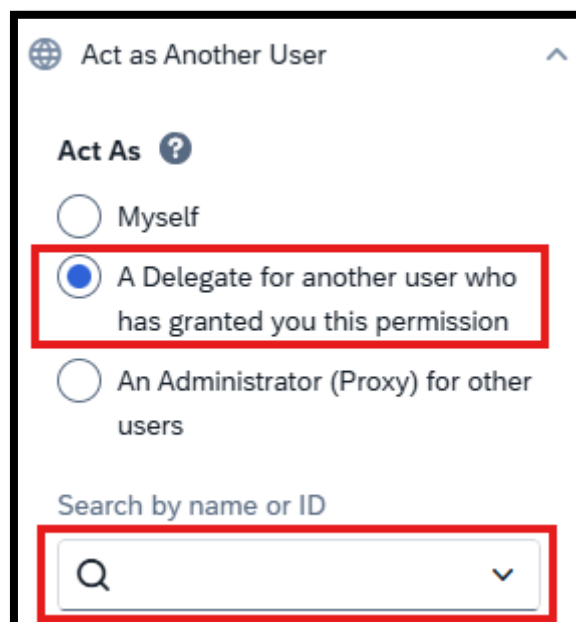
5

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

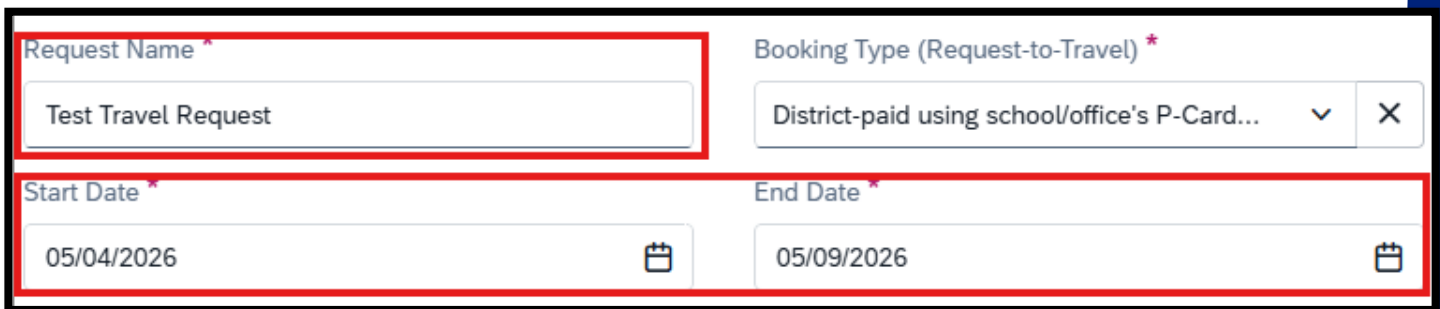
8

Click **Create Request**.

| | |
|--|---|
|  <p>Create Request Start an approval request for travel or expenses.</p> |  <p>Create Expense Report Begin an expense report to track business related expenses.</p> |
|--|---|

9

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.



A screenshot of a travel request form. The 'Request Name' field contains 'Test Travel Request'. The 'Booking Type (Request-to-Travel)' dropdown is set to 'District-paid using school/office's P-Card...'. The 'Start Date' is '05/04/2026' and the 'End Date' is '05/09/2026'. Red boxes highlight the 'Request Name' and 'Start Date'/'End Date' fields.

10

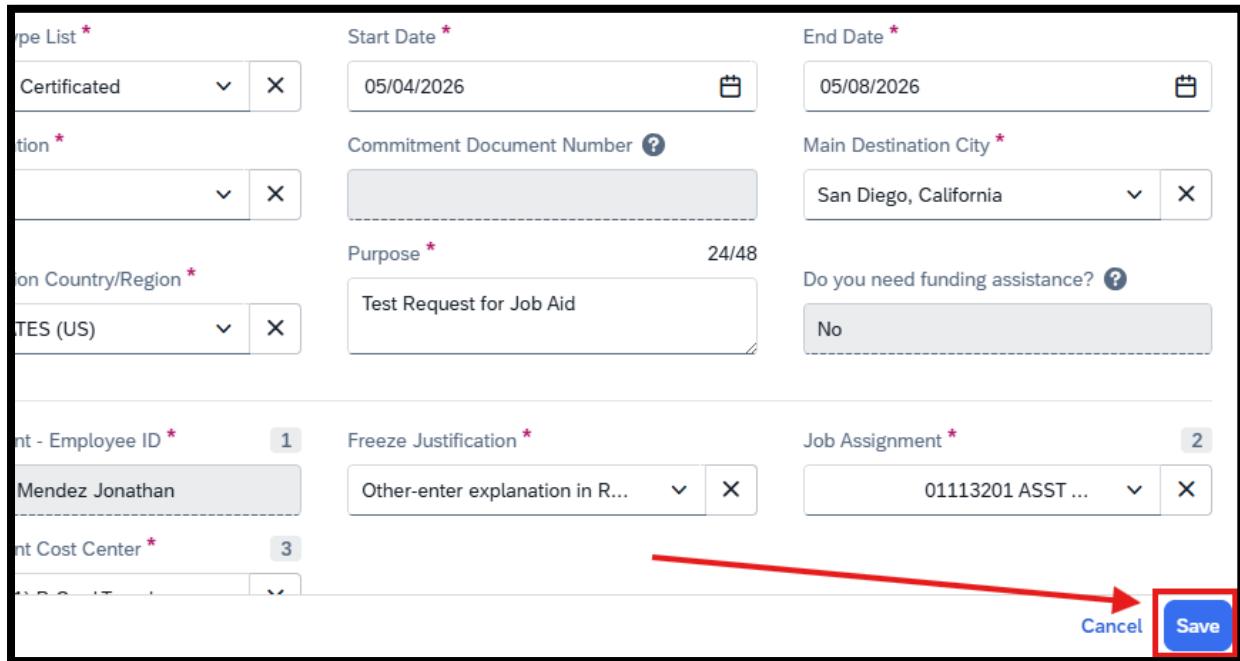
If you select **Other—enter explanation in Request Purpose** under the **Freeze Justification field**, explain the reason in the **Purpose field**. Be specific such as presenting on behalf of LAUSD, required grant training, award recipient, PD, etc.



A screenshot of the 'Purpose' and 'Freeze Justification' fields. The 'Purpose' field is empty and has a character count of '0/48'. The 'Freeze Justification' field is a dropdown menu, currently showing a downward arrow.

11

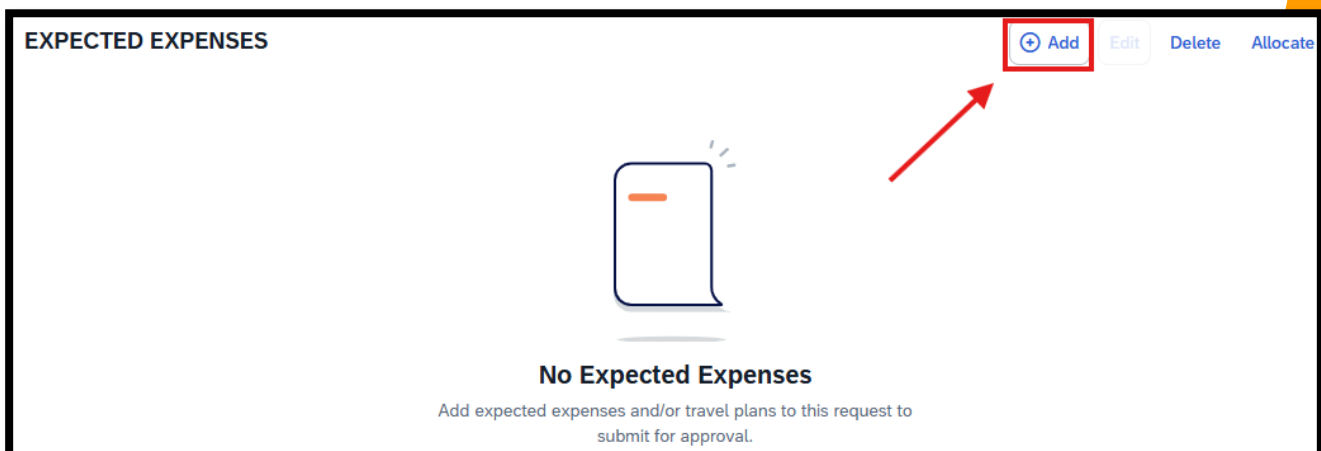
After filling out all the required fields, click **Create Request**.



The screenshot shows a form with several fields: 'Type List' (Certificated), 'Start Date' (05/04/2026), 'End Date' (05/08/2026), 'Main Destination City' (San Diego, California), 'Purpose' (Test Request for Job Aid), 'Employee ID' (Mendez Jonathan), and 'Job Assignment' (01113201 ASST ...). A red arrow points to the 'Save' button in the bottom right corner.

12

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



The screenshot shows the 'EXPECTED EXPENSES' section with a red arrow pointing to the 'Add' button. Below the button, there is a message: 'No Expected Expenses' and 'Add expected expenses and/or travel plans to this request to submit for approval.'

13

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

14

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

Mileage *

Search by Text Q X

Non-Travel Mileage

Travel Mileage

Self-Paid

Currency *

US, Dollar (USD) v X

15

Click **Save**.

The screenshot shows a form titled "New Expense: Personal Car Mileage" with the "Allocate" logo. The form contains several fields: "Transaction Date" (04/01/2026), "Business Purpose" (Test Request for Job Aid), "Mileage" (Travel Mileage), "Distance", "Transaction Amount", "Currency" (US Dollar (USD)), and "Payment type" (Self-Paid). There is a "Comment" field at the bottom. Two "Save" buttons are highlighted with red boxes and red arrows: one at the top right and one at the bottom left. A "Cancel" button is also visible next to each "Save" button.

16

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

The screenshot shows a "Test Travel Request \$29.00" page. At the top, there is an "Alerts: 2" notification. Below the title, there are "Submit Request" and "Delete Request" buttons. The request status is "Not Submitted" with "Request ID: 3XKF" and dates "05/04/2026 - 05/08/2026". There are links for "Request Details", "Print", and "Attachments".

The "EXPECTED EXPENSES" section contains a table with the following data:

| <input type="checkbox"/> | Alert↓↑ | Expense type↓↑ | Details↓↑ | Date↓↑ | Amount↓↑ | Requested↓↑ |
|--------------------------|---------|----------------------|-----------|------------|----------|-------------|
| <input type="checkbox"/> | ✖ | Personal Car Mileage | | 04/01/2026 | \$29.00 | \$29.00 |
| | | | | | | \$29.00 |

An "Add" button (with a plus icon) is highlighted with a red box and a red arrow. Other buttons "Edit", "Delete", and "Allocate" are also visible.

17

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

18

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

Check-Out

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

Vendor: (Hilton Hotels) Hilton Hotels Comment: 0/2000

Business Purpose: 0/48 Total Amount: 600.00 Hotel Business Purpose: *Hotel expense is less than \$300 USD per night

Payment type: LAUSD District Paid-P-Card, PO, Imprest

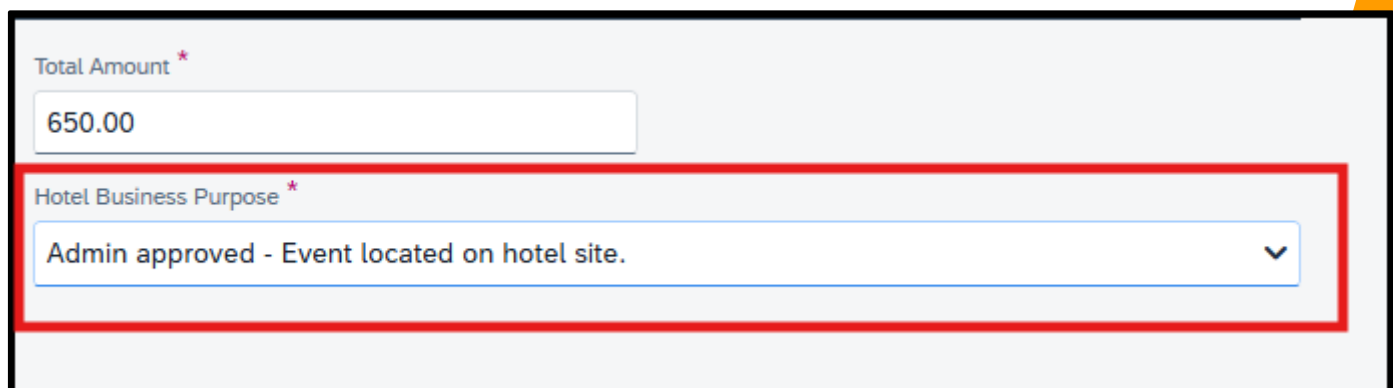
Save Cancel

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



A screenshot of a web form showing a dropdown menu for 'Vendor *'. The selected option is '(Other Hotel) Other Hotel'. The dropdown 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 selected option 'Admin approved - Event located on hotel site.'. 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.

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

21

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

| <input type="checkbox"/> | Alert↑↓ | Expense type↑↓ | Details↑↓ | Date↑↓ | Amount↑↓ | Requested↑↓ |
|--------------------------|---------|----------------------|---------------------------|------------|----------|-----------------|
| <input type="checkbox"/> | ✖ | Hotel | Santa Barbara, California | 07/15/2025 | \$900.00 | \$900.00 |
| <input type="checkbox"/> | ✖ | Personal Car Mileage | | 02/05/2025 | \$0.70 | \$0.70 |
| | | | | | | \$900.70 |

22

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 *

Trip End Date *

Total Number Days of Trip *

Number of Full Days *

Number of Half Days *

Number of Meals Provided *

23

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" with a "Save" button highlighted in red in the top right corner. Another "Save" button is highlighted in red in the bottom left corner. The form contains several input fields: "Business Purpose" (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). A "Comment" field is also present at the bottom.

24

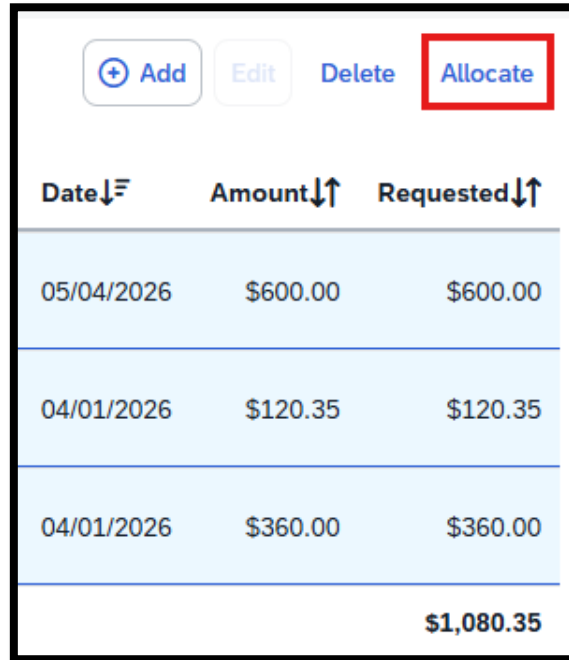
Once you've entered **all** the **expenses**, check the boxes to highlight each **expense type**.

The screenshot shows a table titled "EXPECTED EXPENSES" with a red box highlighting the first column of checkboxes. The table has three columns: a checkbox, an "Alert" column with up/down arrows, and an "Expense type" column with up/down arrows. The rows are: Hotel, Personal Car Mileage, and Per Diem. Each row has a checked checkbox, a red 'X' in the Alert column, and the expense type in the Expense type column.

| <input checked="" type="checkbox"/> | Alert↓↑ | Expense type↓↑ |
|-------------------------------------|---------|----------------------|
| <input checked="" type="checkbox"/> | ✗ | Hotel |
| <input checked="" type="checkbox"/> | ✗ | Personal Car Mileage |
| <input checked="" type="checkbox"/> | ✗ | Per Diem |

25

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

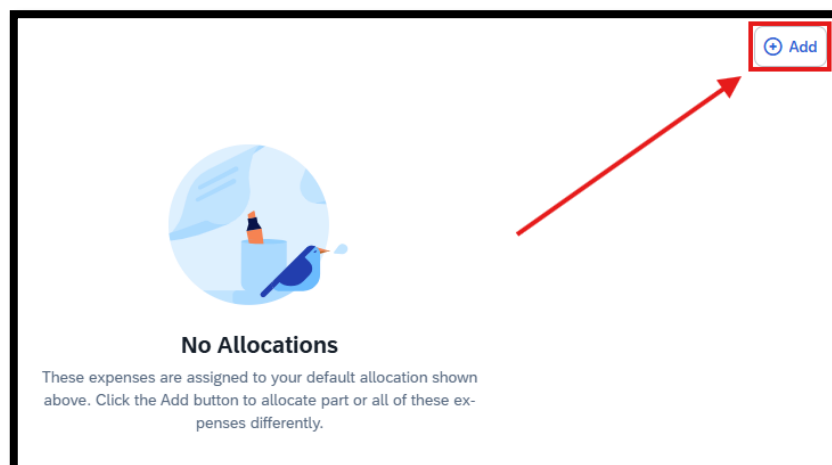


A screenshot of a user interface showing a table with three columns: 'Date', 'Amount', and 'Requested'. Above the table are four buttons: 'Add', 'Edit', 'Delete', and 'Allocate'. The 'Allocate' button is highlighted with a red border. The table contains three rows of data and a total row at the bottom.

| 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 |

26

Click **Add**.



27

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' (selected) and '★ Favorite Allocations'. Below the tabs is a search bar containing '(CC) Cost Center'. The main form area contains three dropdown menus: 'Cost Object Value', 'Fund', and 'Functional Area'. These three fields are enclosed in a red rectangular box. At the bottom right of the form, there are two buttons: 'Save' and 'Cancel'.

28

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

This is a close-up view of the 'Cost Object Value' field. The field is highlighted with a red border. It contains the text 'Contract Admin and Procurement Services' and has a dropdown arrow on the right. Below it, the 'Fund' field is visible with 'GF-Unrestricted' selected. The 'Functional Area' field is also visible with 'General Fund Sch Program' selected.

29

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 | |
| | ▼ |

30

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 |

31

Click **Save**.

The screenshot shows the 'Add Allocation' form with the following fields:

- (CC) Cost Center:** (CC) Cost Center
- Cost Object Value:** 4, Contract Admin and Procurement Services
- Fund:** GF-Unrestricted
- Functional Area:** General Fund Sch Program

At the bottom right, there are two buttons: **Save** (highlighted with a red box and a red arrow) and **Cancel**.

32

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

The screenshot shows the 'Allocations (1)' window with the following details:

- Amount:** \$1,080.35
- Allocated:** \$1,080.35 (100%)
- Remaining:** \$0.00 (0%)
- Default Allocation Code:** Default

| 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 |

At the bottom right, there are two buttons: **Save** (highlighted with a red box and a red arrow) and **Cancel**.

33

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

The screenshot shows a web interface for a request titled "TESTING \$1,080.70". The status is "Not Submitted" and the Request ID is "3JJW". There are three dropdown menus: "Request Details", "Print", and "Attachments". The "Attachments" dropdown is open, and the "Attach Documents" option is highlighted with a red rectangular box. Below this, there is a section titled "EXPECTED EXPENSES" with a table of expense types. Each row has a checkbox, the expense type name, and a "Details" link.

| <input type="checkbox"/> | Expense type↑↓ | Details↑↓ |
|--------------------------|----------------------|---------------------------|
| <input type="checkbox"/> | Hotel | Santa Barbara, California |
| <input type="checkbox"/> | Personal Car Mileage | |
| <input type="checkbox"/> | Per Diem | |


34

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". It features a large blue dashed-line box for dropping files. In the center of this box is an icon of a document with an upward arrow and a hand cursor. Below the box, text reads: "Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file." At the bottom center of the dialog is a button labeled "Upload and Attach". In the bottom right corner, there is a "Close" button.

35

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.

36

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](#)

37

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

| <input type="checkbox"/> | Alert↓↑ | Expense type↓↑ | Details↓↑ | Date↓↑ | Amount↓↑ | Requested↓↑ |
|--------------------------|---------|----------------------|-----------------------|------------|------------|--|
| <input type="checkbox"/> | | Hotel | San Diego, California | 05/04/2026 | \$1,500.00 | \$1,500.00 <small>Allocated</small> |
| <input type="checkbox"/> | | Personal Car Mileage | | 04/01/2026 | \$120.35 | \$120.35 <small>Allocated</small> |
| <input type="checkbox"/> | | Per Diem | | 04/01/2026 | \$360.00 | \$360.00 <small>Allocated</small> |
| | | | | | | \$1,980.35 |

38

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

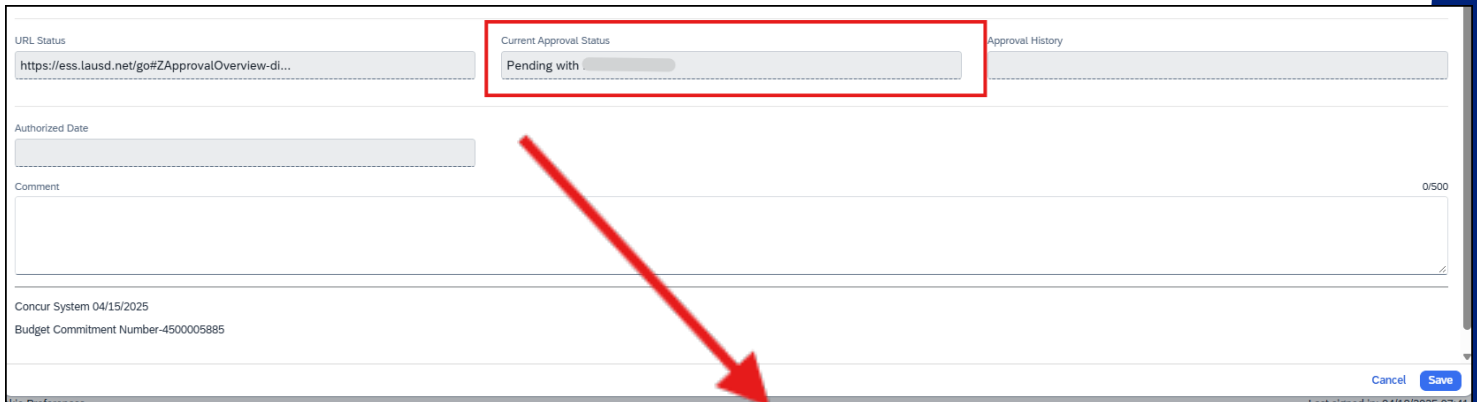
Request Details ▾ Print ▾ Attachments ▾

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

EXPECTED EXPENSES

| <input type="checkbox"/> | Expense type↓↑ | Details↓↑ |
|--------------------------|----------------|-----------|
| <input type="checkbox"/> | Hotel | San Diego |

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



The screenshot shows a web form with several fields. A red box highlights the 'Current Approval Status' field, which contains the text 'Pending with'. A red arrow points from this field to a zoomed-in view of the same field shown in a separate box below.

URL Status
https://ess.lausd.net/go#ZApprovalOverview-di...

Current Approval Status
Pending with

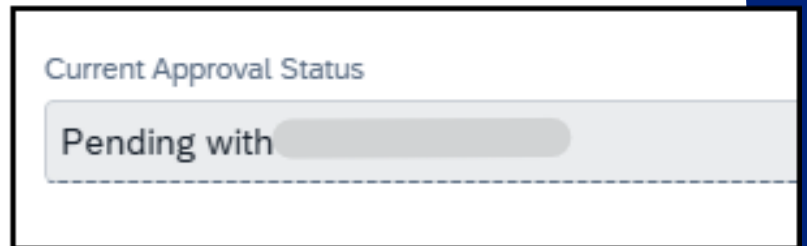
Approval History

Authorized Date

Comment 0/500

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

Cancel Save



This box shows a close-up of the 'Current Approval Status' field, which displays 'Pending with' followed by a blurred area representing the approver's name.

Current Approval Status
Pending with