

Standard Routing and Ad hoc Routing (Approval and Delegates included)

Please see information below for both Request and Expense standard workflow and how to add additional approvers.

Request

Standard Routing

Standard routing below is automatically created/routed by Concur.

To view where your Request will be routed, click on the "Approval Flow" tab within the Request.

1. Office of International Health and Safety (OIHS) Approver – conditional
 - a. OIHS will receive all Requests that include risk levels that are classified as a 4, 5 and some of the 3s. The traveler may or may not need to perform additional steps as outlined by the processes found on the OIHS website.
 - b. You will not see a name indicated in the box, as this routes to the entire group of OIHS employees for assessment.
2. Department Approver – required
 - a. Your Department Approver is predetermined by your primary HR appointment Organization Code.
 - b. This person can change accounting string information only. If other changes need to be made, or the trip Request cancelled, there is a "Send Back" button to select to return the Request to the traveler/delegate.
3. Student Employee/Profiled Guest Approver – conditional/optional
 - a. ADDED April 2020
 - b. For Requests that are being submitted under a **Student Employee profile**, the option to add an approver that will override the Department Approver is available.
 - c. If an approver is added in this field, the Department Approver will be *skipped* in workflow. If no approver is added in this field, the Request will route to the designated Department Approver.
 - d. This person can change accounting string information only. If other changes need to be made, or the trip Request cancelled, there is a "Send Back" button to select to return the Request to the traveler/delegate.
4. Fiscal Officer (FO) Approver – conditional
 - a. All FOs of all accounts used will receive the Request for approval.
 - b. FOs are updated based on current assignees in the Kuali Financial System (KFS). The name of the FOs will not appear until the Request is routed for this approval.
 - c. This person(s) can change accounting string information only. If other changes need to be made, or the trip Request cancelled, there is a

- "Send Back" button to select to return the Request to the traveler/delegate.
- d. This step may be skipped if the Travel Funding Source is listed as "Non-MSU Funds" or "Self Funded", as accounting information is not allowed for these funding sources.
 - e. This step will also be skipped if the FO is also the traveler on the Request.
5. Cash Advance Admin Review – conditional
- a. ADDED April 2020
 - b. All Requests that have a cash advance amount indicated on the Request Header will be routed for review. Review will be done based on policy requirements.
 - i. Review will be done separately from issuance of the cash advance.
 - ii. Issuance will occur 2-3 weeks prior to Trip Start Date.
 - c. You will not see a name indicated in the box, as this routes to the entire group of Cash Advance Administrators for assessment.
 - d. If changes need to be made, or the cash advance Request cancelled, there is a "Send Back" button to select to return the Request to the traveler/delegate.
 - e. This step may be skipped if there is no cash advance being requested.

Ad-hoc Routing

If you need an additional Request approver other than what is provided to you in the workflow, you may ad-hoc another MSU faculty or staff employee. Note that all ad hoc approvers have access to edit accounting string information.

1. View your workflow in the "Approval Flow" tab of your Request.
2. Use the plus sign to add a "User-Added Approver" either before or after a designated approver. Note: All approvers have edit capability on accounting string information. We do not recommend adding an ad hoc after the Fiscal Officer.
3. Search for the employee by either Last Name, First Name, Email Address, or Login ID.
4. Click "Save Workflow".

All ad hoc routing is an "approval" action. There is no "FYI" or "Acknowledge" option like MSU's financial system allows. Note that if your request is Sent Back for changes, you will have to redo the ad hoc workflow.

Expense Report Standard Routing

Standard routing below is automatically created/routed by Concur.

To view where your Expense Report will be routed, click on the Report Details tab, then Report Timeline within your Expense Report.

1. Fiscal Officer (FO) Approver – required
 - a. All FOs of all accounts used will receive the Expense Report for approval.
 - b. FOs are updated based on current assignees in Kuali Financial System (KFS). The name of the FOs will not appear until the Expense Report is routed for this approval.
 - c. This person(s) can change accounting string information only. If other changes need to be made, there is a “Send Back” button to select to return the Expense Report to the traveler/delegate.
2. Contracts & Grants (CGA) Approver – conditional
 - a. CGA will receive all Expense Reports that have an RC account AND an international trip.
 - b. You will not see a name indicated in the box, as this routes to the entire group of CGA employees for assessment.
3. Central Accounting Office Approver – required
 - a. Central Accounting will receive all Expense Reports for approval.
 - b. You will not see a name indicated in the box, as this routes to the entire group of Central Accounting employees for assessment.

Ad-hoc Routing

If you need an additional Expense Report approver other than what is provided to you in the workflow, you may ad-hoc another MSU faculty or staff employee. Note that all ad hoc approvers have access to edit accounting string information.

1. Click the name of the Expense Report you want to open.
2. Click “Report Details”, then select “Report Timeline” from the dropdown.
3. Click Edit next to “Approval Flow”

4. “Add Step” either above or below a given approver. Note: All approvers have edit capability on accounting string information. We do not recommend adding an ad hoc after the Fiscal Officer. An ad hoc added after CGA Approvers or Central Accounting Office Approver is not allowed.
5. Search for the approver either by Last Name, First Name, Email Address, or Login ID
6. Click “Save” and “Close”.

All ad hoc routing is an “approval” action. There is no “FYI” or “Acknowledge” option like MSU’s financial system allows. Note that if your report is Sent Back for changes, you will have to redo the ad hoc workflow.

Approvers

Approvers also have the option to add additional ad hoc approvers to Expense Reports.

1. Click the name of the Expense Report you want to open.
2. Review the Expense Report, then click Details, "Approval Flow".
3. In the "User-Added Approver" field, click the plus sign, then the dropdown to select Last Name or Email Address for the search method.
4. Search for, then select the appropriate individual.
5. Click "Save Workflow".
6. Click "Approve".

Delegate Approval

If an approver has assigned you as a delegate, you may approve Requests and Expense Reports on his/her behalf.

1. Go to "Profile Settings".
2. Select a user from the dropdown menu under "Acting as other user" and click "Start Session".
3. Click Approvals tab.
4. Approve the Request or Expense Report as normal.