Michigan State University employees can submit a travel Request in Concur with requested trip expenses on behalf of a Student Employee. Michigan State Student Employees can also submit a travel Request for themselves.

- The Department Approver is determined by the employee's primary HR appointment Organization Code.
- 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.
  - If an additional approver is added, the Department Approver will be skipped in workflow.
  - If no additional approver is added, the Request will route to the designated Department Approver.
- If 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.

Example: If a student works in a Residence Hall and is traveling on behalf of their college, their Request will route to the Residence Hall approver. If an additional approver is added before the Department Approver (Residence Hall Approver) in the Approval Flow, the Department Approver will be skipped. See *Exhibit 6-9*

1. Start at the **Concur Homepage**, Select **Start a Request**.
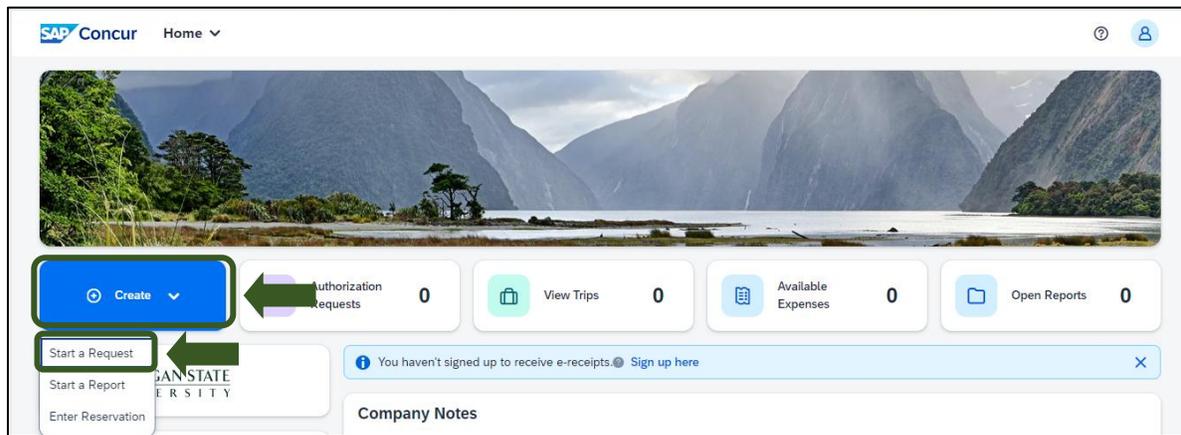
Exhibit 1

NOTE: Concur provides 2 options to create a Request. See "Manage Employee Requests" guide for details.

2. In the Request Header, Select "No" if the Student's Approver is not in the same Department funding the travel.

NOTE: If selecting "**NO**", user must use **Edit Approval Flow** when creating a Request to add the appropriate Approver. If a student works with multiple MSU departments, contact your supervisor to determine the appropriate approver for the department funding the travel.
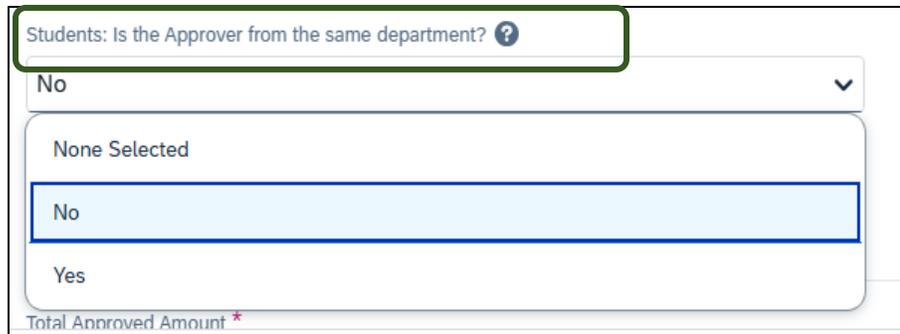
Exhibit 2

Please see *Step 5* on how to **Edit Approval Flow** so your appropriate Approver receives your Request.
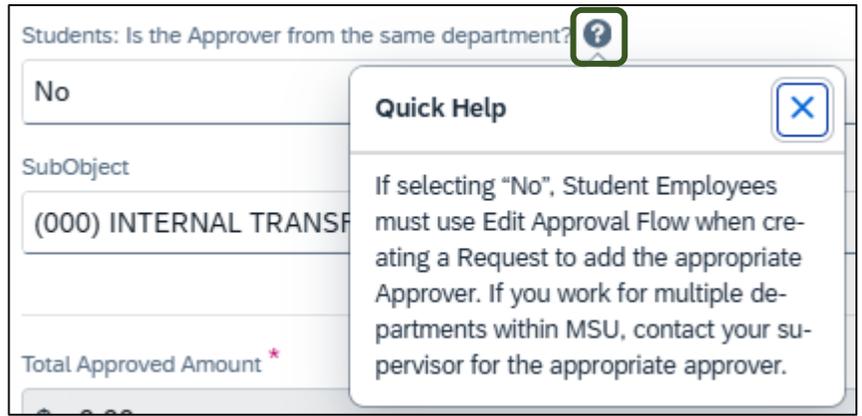
Exhibit 3

3. Enter the necessary information and required fields (indicated with a *) for the travel Request. Enter any additional information you would like to share with the Approver in the **Comments** field. Select **Create Request** once you are done filling in the required information.

Exhibit 4

NOTE: Entries in the **Request/Trip Name** field populate the Accounting String in KFS.

4. If you need to edit your Request Approver, select **Edit Approval Flow**.

Exhibit 5

5. On the Edit Approval Flow screen, select +**Add Step** before the Department Approver in the Approval Flow.

Edit Approval Flow

(+ Add Step)

Office for Global Health, Safety, and Security Approver

+ Add Step

Department Approver

Lee, Lynn

+ Add Step

Student Employee/Profiled Guest Approver

+ Add Step

Fiscal Officer Approver

+ Add Step

Exhibit 6

6. In the **User-Added Approver** field, enter the name of the Approver to be added into the Approval Flow
>Select the Approver's Name from the dropdown menu
>**Save**.

Edit Approval Flow

+ Add Step

User-Added Approver *

| Last Name ∨ | | 🔍 |

Delete

Warden, Deborah A. (warden@msu.edu)
User ID: ████████ Logon ID:
████@msu.edu
████@msu.edu

+ Add Step

Department Approver

Lee, Lynn

+ Add Step

Student Employee/Profiled Guest Approver

+ Add Step

Fiscal Officer Approver

Cancel Save

Exhibit 7

3

7. The added Approver is now visible in the Approval Flow.

Office for Global Health, Safety, and Security Approver

User-Added Approver

Department Approver

Student Employee/Profiled Guest Approver

Fiscal Officer Approver

Cash Advance Admin Review
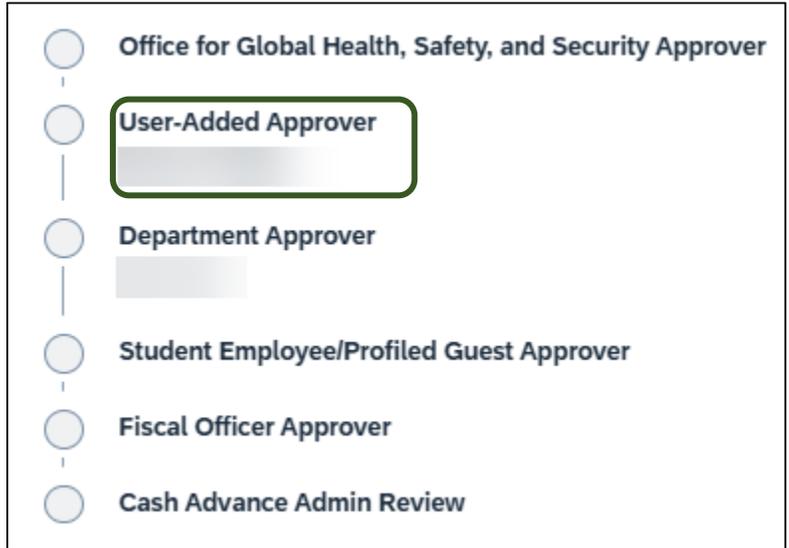
Exhibit 8

8. In the Expected Expenses section, select **Add** and enter estimated amounts for the Student Employee's expenses. Select the expense types that apply.

Student Employee Request

Not Submitted | Request ID: PT7Q

Submit Request   Copy Request   Edit Approval Flow   Delete Request

Request Details ⌄   Print/Share ⌄   Attachments ⌄

EXPECTED EXPENSES   ⊕ Add   Edit   Delete   Allocate
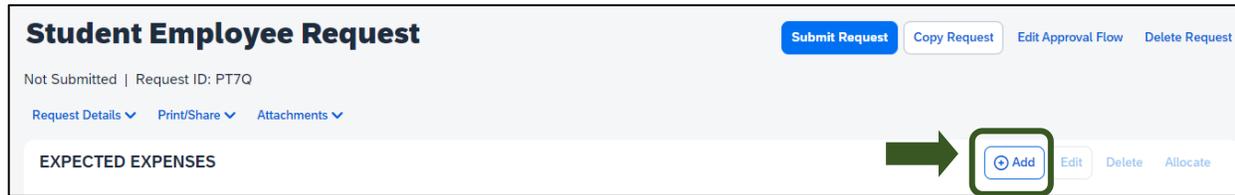
Exhibit 9

Some common expenses are *Air Ticket, Car Rental, Hotel Reservation,* and *Daily Meal Per Diem Allowance*.

Add expected expenses and/or travel plans

Search for an expense type

⌄ 01. Travel Expenses
Daily Meal Per Diem Allowance
Expense Reduction
Hotel Cleaning Charge
Hotel Reservation
Lodging Paid for Others
Meal Per Diem Multiple Destinations (Request)
Per Diem Reduction
⌄ 02. Transportation
Air Ticket
Airline Fees
Baggage Fee
Car Rental
Car Rental Fuel

Add expected expenses and/or travel plans to this request to

Exhibit 10

4

9. To add documents for the approvers' review, select the **Attachments** dropdown menu
>**Attach Documents**
>**Upload and Attach**
>Double click the file you want to upload.

Student Employee Request

Not Submitted | Request ID: PT7Q

Request Details ⌄   Print/Share ⌄   Attachments ⌄

EXPECTED EXPENSES   Attach Documents

Exhibit 11

NOTE: Preferred attachment formats are JPEG or PDF.

Document Upload and Attach ✕

↑
Upload and Attach

Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.

Close
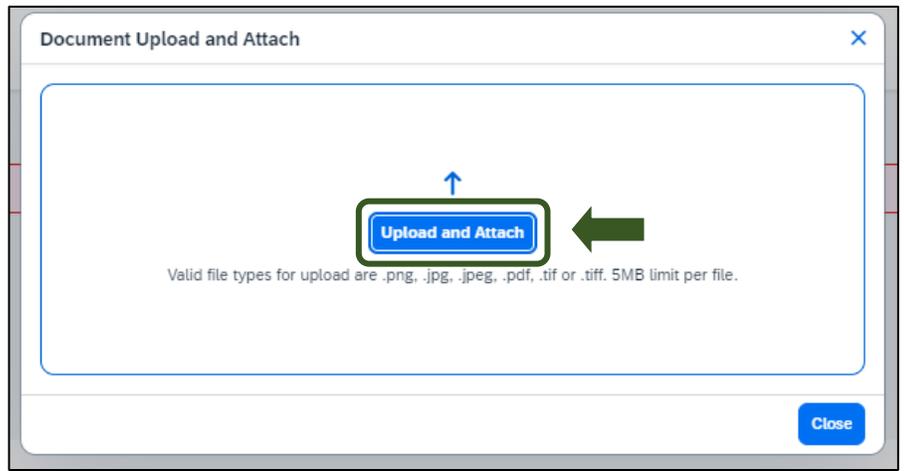
Exhibit 12

10. The red folder icon will indicate the file is uploaded for the approvers review.

Attachments 📁 ⌄

Exhibit 13

11. When you have completed the Student Employee's Expected Expenses and the request is ready, select **Submit Request.**

Student Employee Request

Not Submitted | Request ID: PT7Q

Request Details ⌄   Print/Share ⌄   Attachments ⌄

Submit Request   Copy Request   Edit Approval Flow   Delete Request
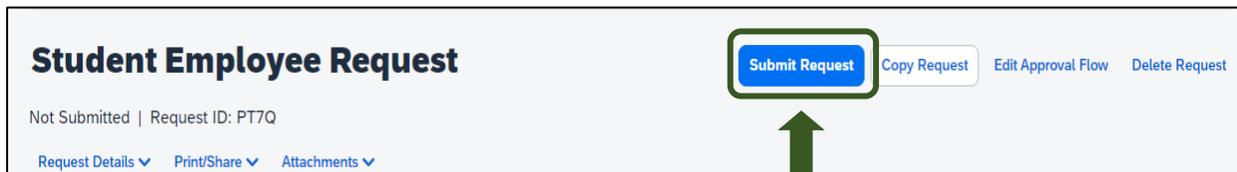
Exhibit 14

12. Select **Accept and Continue** to send the request to the approver.
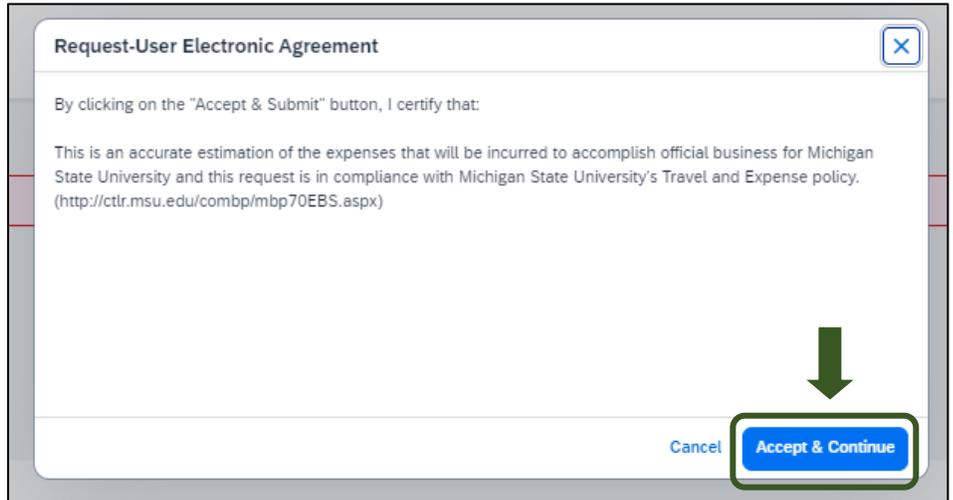
Request-User Electronic Agreement   [×]

By clicking on the "Accept & Submit" button, I certify that:

This is an accurate estimation of the expenses that will be incurred to accomplish official business for Michigan State University and this request is in compliance with Michigan State University's Travel and Expense policy. (http://ctlr.msu.edu/combp/mbp70EBS.aspx)

Cancel   **Accept & Continue**

Exhibit 15

13. A tile reflecting the Request you just created will be visible on the Manage Requests screen.
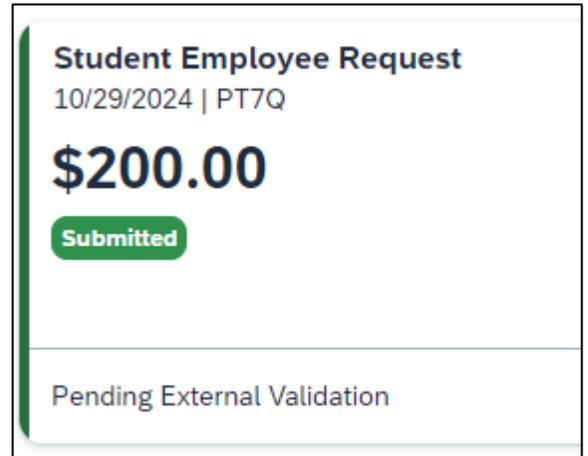
Student Employee Request
10/29/2024 | PT7Q

$200.00

Submitted

Pending External Validation

Exhibit 16

UI REV 2: 3/25