

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

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

### **Request Standard Routing**

For the standard routing noted below, this 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 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 will be able to change accounting string information only. 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.
3. Fiscal Officer (FO) Approver – conditional
  - a. All FOs of all accounts used will receive this request 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 request is routed for this approval.
  - c. This person(s) will be able to change accounting string information only. 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.
  - 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.

### **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".

Note: All ad hoc routing is an "approval" action. There is no "FYI" or "Acknowledge" option like MSU's financial system allows.

## **Expense Report**

### **Standard Routing**

For the standard routing noted below, this 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 report.

1. Fiscal Officer (FO) Approver – required
  - a. All FOs of all accounts used will receive this 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 report is routed for this approval.
  - c. This person(s) will be able to change accounting string information only. If changes need to be made, there is a "Send Back" button to select to return the report to the traveler/delegate.
2. Contracts & Grants (CGA) Approver – conditional
  - a. CGA will receive all reports that have an RC account AND is 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 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 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".

Note: All ad hoc routing is an "approval" action. There is no "FYI" or "Acknowledge" option like MSU's financial system allows.

### **Approvers**

Approvers also have the option to add additional ad hoc approvers to expense reports.

1. Click the name of the report you want to open.
2. Review the 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/Expense as normal.