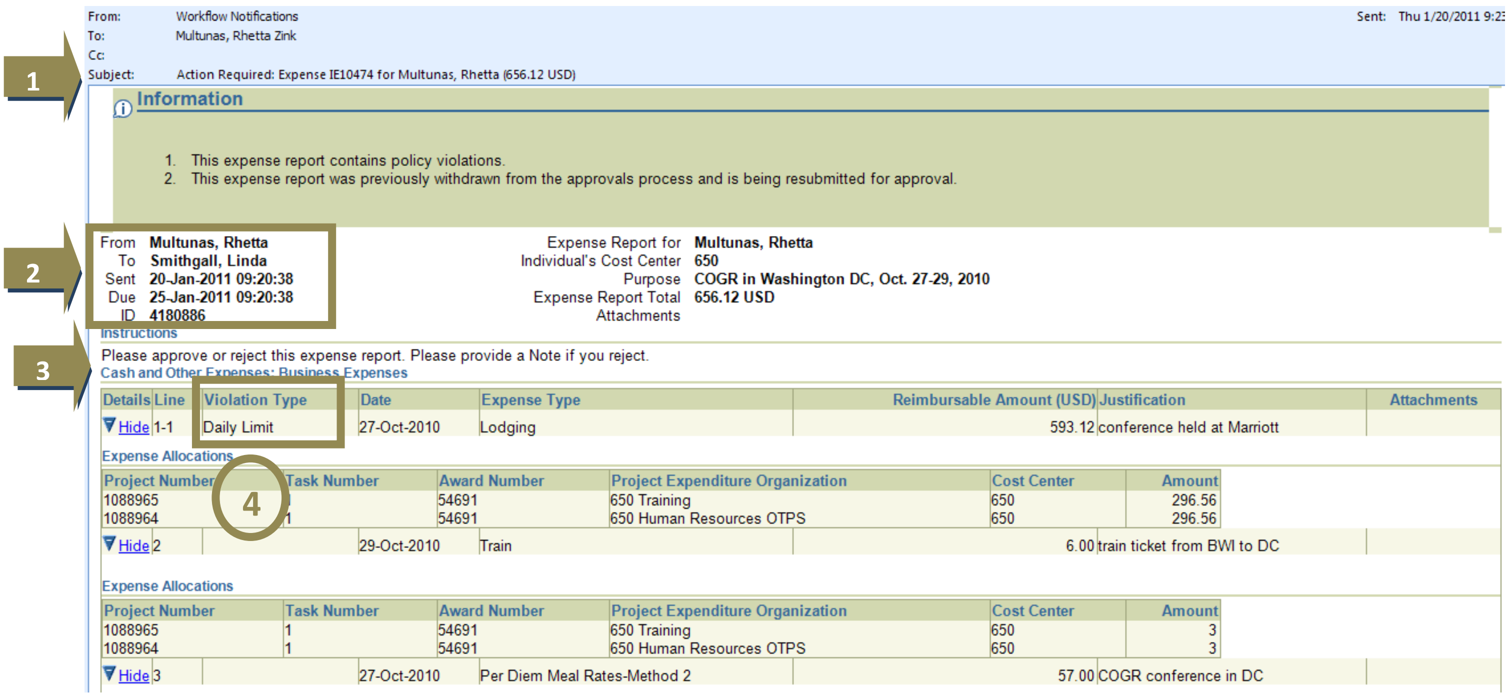
The Research Foundation
The State University of New York

Job Aid
Approver Role & using iExpense

Contact: rftravel@rfsuny.org

Use this job aid to successfully navigate through the workflow process of the Approver and the Approver Role screens in iExpense.



1	Be aware of the features of the **Workflow notification message** for the expense report approver. The action required is indicated in the subject line of the email message (**Note:** This message screen continues onto the next page of this job aid)
2	**From:** Traveler or prior approver **To:** Approver **Sent:** Date and time expense report or prior approval submitted **Due:** Date/time by which you need to take action or expense report is returned to the traveler (6 days after submission) **ID:** System-generated expense report number
3	*Instructions* indicate the action (if any) you need to take
4	The policy violation is indicated under *Violation Type*

Expense Allocations

Project Number	Task Number	Award Number	Project Expenditure Organization	Cost Center	Amount
1088965	1	54691	650 Training	650	28.5
1088964	1	54691	650 Human Resources OTPS	650	28.5
			Total	656.12	

Previously Submitted Expenses

Date	Expense Type	Merchant Name	Reimbursable Amount	Payment Method	Justification
No results found.					

1

Approvals History

Seq.	Date	Status	Performer	Approval Group	Comments
1	20-Jan-2011 09:20:38	Notified	Smithgall, Linda	RFCUST_IExpense_Main_Approver_Group	

Related Applications

2

Expense Report Details

3

Please click here to Respond

1	*(Continuation of sample* ***Workflow notification message*** *for expense report Approver)* *Approvals History* lists all actions previously taken and by whom
2	Use the ***Expense Report Details*** link to log in to iExpense and see detailed information for this expense report. You will not be able to take any action (accept, reject, etc.) from this link
3	Use this link to log in to iExpense and take action on this expense report

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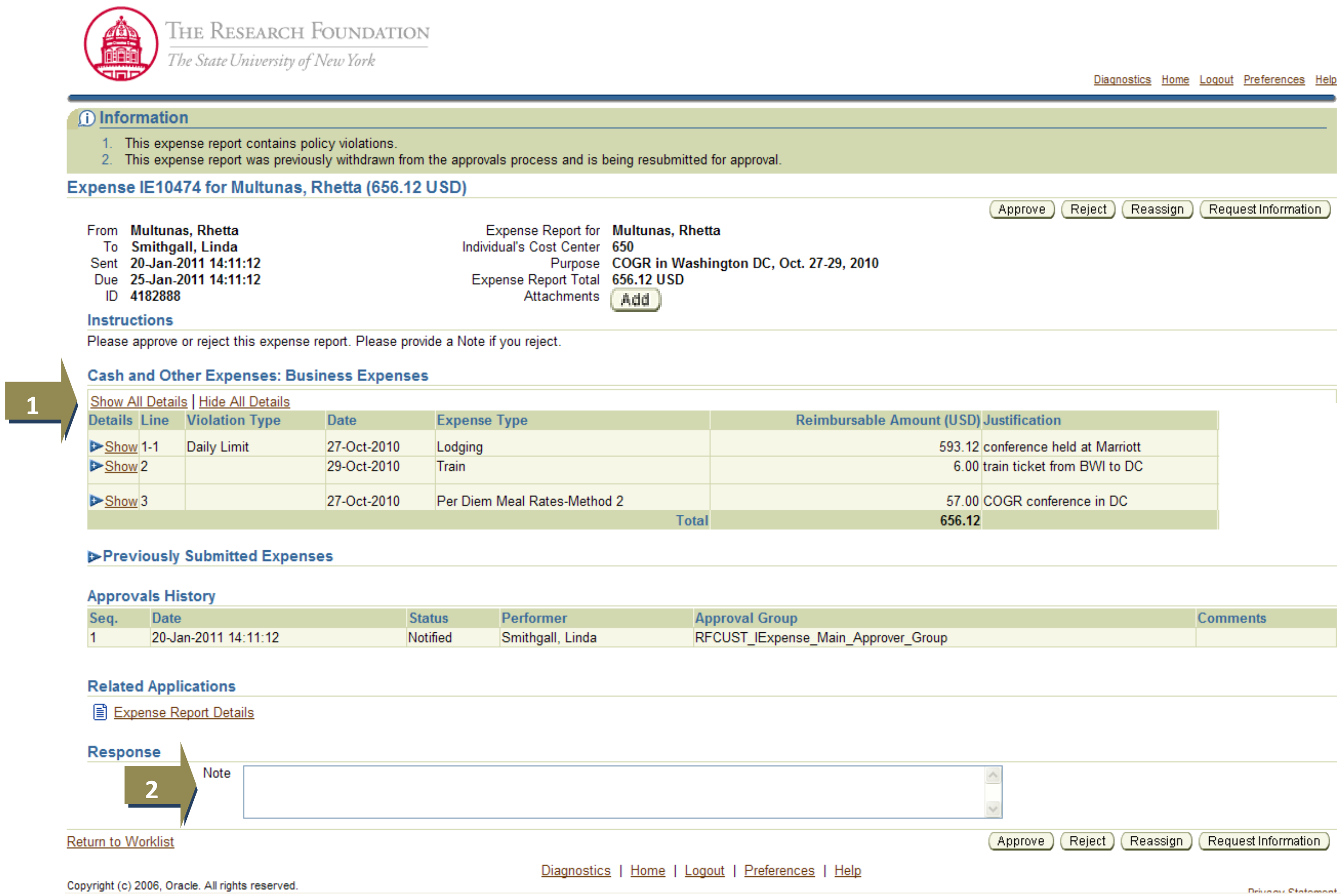
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Diagnostics Home Logout Preferences Help

Information
1. This expense report contains policy violations.
2. This expense report was previously withdrawn from the approvals process and is being resubmitted for approval.

Expense IE10474 for Multunas, Rhetta (656.12 USD)

Approve | Reject | Reassign | Request Information

From	Multunas, Rhetta	Expense Report for	Multunas, Rhetta
To	Smithgall, Linda	Individual's Cost Center	650
Sent	20-Jan-2011 14:11:12	Purpose	COGR in Washington DC, Oct. 27-29, 2010
Due	25-Jan-2011 14:11:12	Expense Report Total	656.12 USD
ID	4182888	Attachments	Add

Instructions

Please approve or reject this expense report. Please provide a Note if you reject.

Cash and Other Expenses: Business Expenses

1

Show All Details | Hide All Details

Details	Line	Violation Type	Date	Expense Type	Reimbursable Amount (USD)	Justification
Show	1-1	Daily Limit	27-Oct-2010	Lodging	593.12	conference held at Marriott
Show	2		29-Oct-2010	Train	6.00	train ticket from BWI to DC
Show	3		27-Oct-2010	Per Diem Meal Rates-Method 2	57.00	COGR conference in DC
				Total	656.12	

Previously Submitted Expenses

Approvals History

Seq.	Date	Status	Performer	Approval Group	Comments
1	20-Jan-2011 14:11:12	Notified	Smithgall, Linda	RFCUST_IExpense_Main_Approver_Group	

Related Applications

Expense Report Details

Response

2

Note

Return to Worklist

Approve | Reject | Reassign | Request Information

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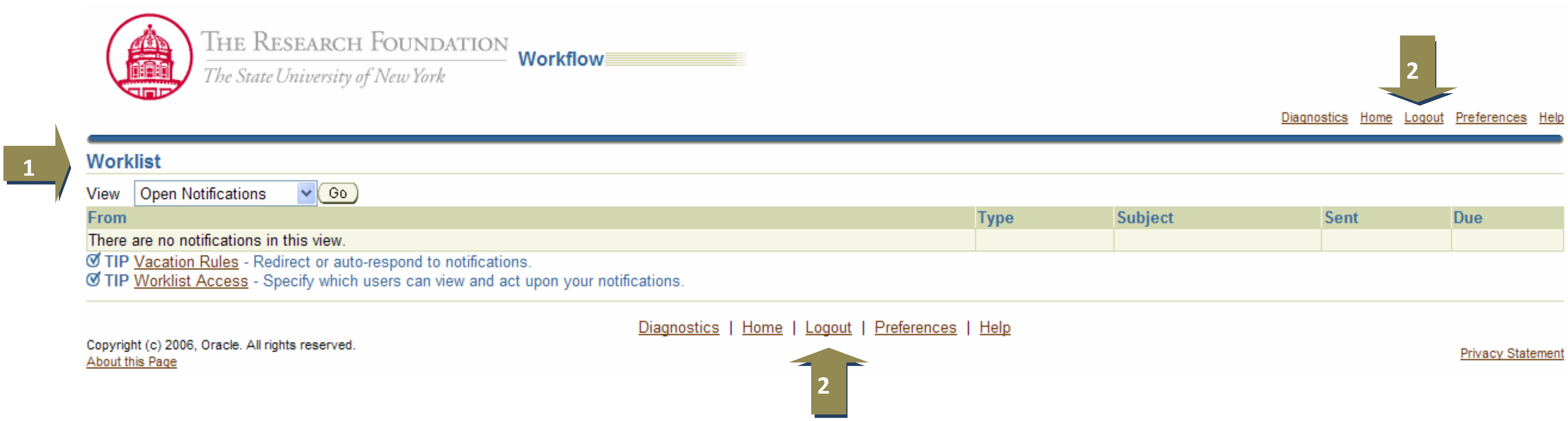
1	Use these links to Show/Hide Details as you prefer. You can Show All or view by line
2	Type in a *Note*. Notes must be added before using **Approve**, **Reject** or **Reassign** action buttons. Example: Please resubmit after correcting or documenting policy violation
3	Use one of these buttons from either the top or bottom menu to take action on this expense report



1	If you select **Approve** or **Reject** buttons from the previous screen, an email is sent to the traveler indicating that the expense report was approved or rejected and this Worklist screen will open **Note:** If you **Reject** will need to provide a *Note* on previous screen
2	Use the ***Logout*** link from either the top or bottom menu to leave the application or close out of the window

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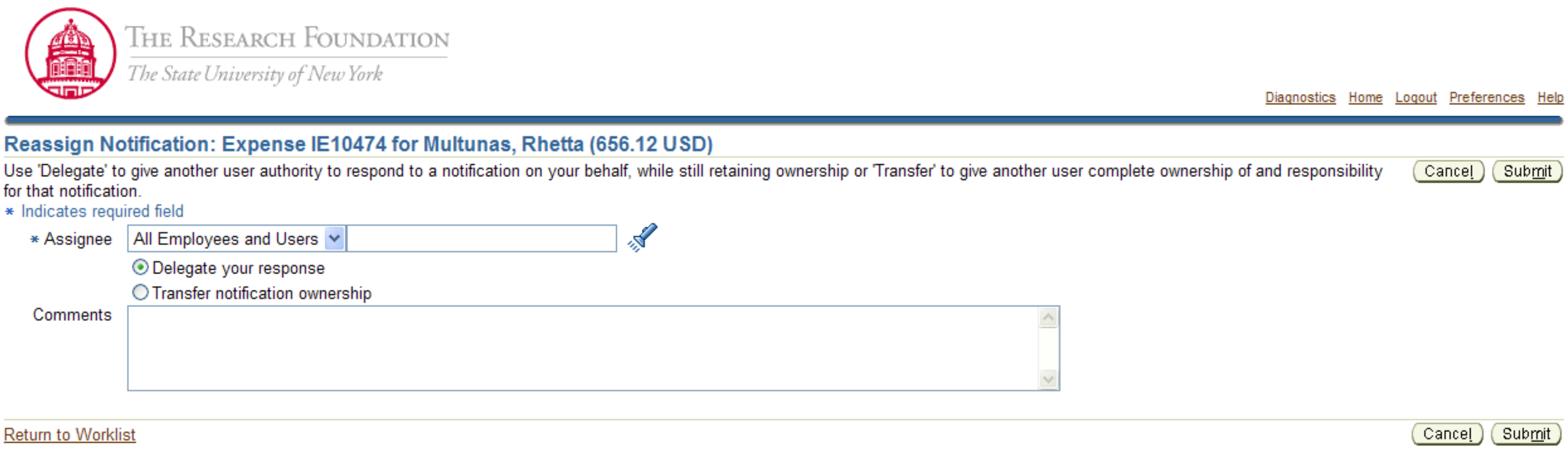
1	If you select **Request Information** from the previous screen this screen will appear where you must indicate who you are requesting more information from. An email will be sent to the person specified.
2	Also required is what information is being requested. Example: Please add documentation regarding why you needed to travel to Washington, D.C. instead of attending the conference in Boston
3	Click the Submit button from either the top or bottom menus once required fields are completed **Note:** Once requested information is gathered and sent it goes to original requester not back through workflow



1	If you select the **Reassign** button from the previous screen this Reassign notification screen will appear. Use the ***Flashlight*** icon to select any Oracle user. You must select a radio button to indicate if you are delegating your response or transferring notification ownership. An email will be sent to the person specified. **Note:** Reassigning an expense report does not delegate your Approver authority for all expense reports. To delegate your Approver authority use the job aid “Set Vacation Rules” (Delegate Approval Authority)
2	Optionally, you may type in any comments. Example: You were Rhetta’s direct supervisor when these expenses were incurred. Please review this expense report and take appropriate action

You have successfully navigated through the workflow process of the Approver and the Approver Role screens in iExpense.