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
Approver Role & using iExpense

1. **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.

*(Continuation of sample Workflow notification message for expense report Approver)*

---

**Expense Allocations**

<table>
<thead>
<tr>
<th>Project Number</th>
<th>Task Number</th>
<th>Award Number</th>
<th>Project Expenditure Organization</th>
<th>Cost Center</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1008965</td>
<td>1</td>
<td>54631</td>
<td>650 Training</td>
<td>850</td>
<td>28.5</td>
</tr>
<tr>
<td>1008964</td>
<td>1</td>
<td>54631</td>
<td>650 Human Resources OTPS</td>
<td>850</td>
<td>28.5</td>
</tr>
</tbody>
</table>

**Previously Submitted Expenses**

<table>
<thead>
<tr>
<th>Date</th>
<th>Expense Type</th>
<th>Merchant Name</th>
<th>Reimbursable Amount</th>
<th>Payment Method</th>
<th>Justification</th>
</tr>
</thead>
<tbody>
<tr>
<td>No results found</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

Related Applications:

1. **Expense Report Details**

---

Copyright (c) 2008, Oracle. All rights reserved.

---

Please click here to Respond
Use these links to Show/Hide Details as you prefer. You can Show All or view by line

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

Use one of these buttons from either the top or bottom menu to take action on this expense report
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.
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.
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)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong></td>
<td>If you select the <strong>Reassign</strong> button from the previous screen this Reassign notification screen will appear. Use the <strong>Flashlight</strong> 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. <strong>Note:</strong> 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)</td>
</tr>
<tr>
<td><strong>2</strong></td>
<td>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</td>
</tr>
</tbody>
</table>

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