

3 Steps to Review and Approve

- 1. Receive Workflow Notification Email
- 2. Determine Action to Approve Expense Report:
 - Is the Business Purpose and Expenses?
 - Allowable
 - Reasonable
 - Applicable to the funding
 - Are Funds available?
- 3. Complete the Approval: Select Approve, Reject, or Request Additional Information

From: Workflow Mailer [mailto:W Sent: Friday, March 11, 2016 8:09 To: Lisa A. Wallace <lisa.a.wallace Subject: Action Required: Expens</lisa.a.wallace 	/FMailer_zinc@dartmouth.edu] AM e@dartmouth.edu> e OIE268191 for Convers, Grogg (25	USD)					
From Content Content To Walface, Lisa Sent 11-Mar-2016 13:07:29 Due 16-Mar-2016 12:07:29 ID 55876481	Expense Indivio Expense R At	Report for Jual's ORG Purpose port Total achments	913 Jest 254.97 USD cc-lexpense.docx				
Instructions Please approve or reject this exp Corporate Credit Card Expense Line Date Expense Type 1 14-Jan-2016 * Meals-Actual-	ense report. Please provide a Note if s: Business Expenses Merchant Name Domestic EVERYTHENG BUT ANCHOV Tota	you reject.	able Amount (USD) 254.97 254.97	Justification	Imaged Receipt Required	Attachments	Account 20.813.368000.321853.1019.8144
Action History							
Num Action Date 1 11-Mar-2016 13:07:29	Action Submit	From Cerveny, Gr	To 100 Wi	flace, Lisa	Details		
Related Applications Image: Expense Report Details Please click on one of the following	ing choices to automatically generat	e an E-mail n	esponse. Before sen	ding the E-mail	response to close this noti	fication, ensure	all response prompts include a

			-							
	Da	rtmo	outh	xpense Reports	1		G a		<u>Home</u> <u>Loqout</u>	Preferences Help Expenses
Expe	nses Home	Expense Search	Credit Card Tra	insactions Assign Delegates						
Expen	ses: Expenses h	iome > Notificati	on Details							
Wai	mina									
	This expense r	enort requires im	and receipts to	he submitted for certain lines. Th	a amployaa b	e provided th	e following ius	tification for miss	ing imaged recei	nts: Lost
Evno		72211 for	aged receipts to		re employee m	as provided en	le folowing jus	ancadon for miss	ing inlaged recei	763. 2030
cxbe	ense OIEZ	72211 101					A	pprove Reject	Reassign R	equest Information
Fro Se Di	m Wallace, nt 15-Mar-: ue 20-Mar-: ID 5588848	Lisa 2016 16:23:44 2016 16:23:44 35		Expense Report for Individual's ORG Purpose Expense Report Total Attachments						
Inst	ructions	reject this exper	sa raport Diassa	provide a Note if you reject						
Con	norate Cred	it Card Expen	se report, Please	rponcos						
Line	Date	Expense Type	Merchant	Reimbursable Amount (USD)	Justification	Imaged Receipt Required	Expense Accounts Updated	Attachment	Account	
1	16-Feb-2016	Supplies-Food & Beverage	LEBANON CO-OP FOODS	44.32		ricquirea	Yes	Û.	20.320.330.0000	
2	02-May-2015	* Lodging- Domestic	HOLIDAY INN BURLINGTON	240.00		~			1963-288-288-5975 	0.0000000000000000000000000000000000000
	Total			284.32						
Act	ion History									
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1	15-Mar-2016	16:23:44 Su	ibmit		Wallac	e <u>, Lisa</u>				
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	Expense Rep	ort Details								
Res	ponse									
	No	l							.:	
Return Dis	<u>to Worklist</u> play next noti	fication after my	esponse				A	pprove Reject	Reassign R	equest Information

Action: Approve Reject Request Information

Approver - Oracle iExpense Expense Reports

- From the email, clicking 'Approve', 'Reject', or 'Request Information' will generate the following workflow email
- Click 'Send' to submit Approval
- When Rejecting or Requesting Information a 'Note' or 'Question' should be provided within the single quote " ' " (i.e. 'Because I said so')

Action Approve Reject Request Information

Action: Approve Reject Request Information

-	From +	Lisa. A. Wallace@Dartmouth.edu		From +	sa.A.Wallace@Dartmouth.edu					
Sand	То	WFMailer_zinc@dartmouth.edu		То	MEMoler size					
Senu	Сс			10						
	Bcc			Сс						
	Subject	Action Required: Expense OIE268191 for <u>Cerveny</u> , Gregg (254.97 USD)		Bcc						
-				Subject	Action Required: Expense OIE268191 for Converse, Conversion Cliffe 93 U	JSD)				
Action:	'Approve'									
Note: "		Action:	'Reject'							
				Because I sai	7					
NID[55878481/156109621558049507571101421073139276978@WFMAIL]										
			NID[55	878481/1561	21558049507571101421073135	LISä.A. wallace@Dartmouth.edu				
					Send To	WFMailer zinc				
					Сс					
					Bcc					
					Subject	More Information Requested: Action Required: Expense OIE268191 ft - Constant Grades (254.62 USD)				
					-					
			Request more inform	mation from: 'D23550C'						
					Question Did you s	Question ¹ Did you seriously not order any fries with your burger? ¹				
					NID[55878481/15610	09621558049507571101421073139276978@WFMAIL][3]				

Approver - Oracle iExpense Expense Reports

Approving through the iExpense System

- Approvers may access and review Expense Reports at: <u>employee.dartmouth.edu</u>
- When Rejecting or Requesting Information provide a Note in the Response section

	Da	rtmc	outh	xpense Reports	1		C.	l	<u>Iome</u> Logout	t <u>Preferences</u> <u>Help</u> Expenses
Expe	nses Home	Expense Search	Credit Card Tra	insactions Assign Delegates						
Expens	es: Expenses H	<u>lome</u> > Notificati	on Details							
War	ning									
Т	his expense r	eport requires im	aged receipts to	be submitted for certain lines. Th	ne employee ha	as provided th	e following just	ification for missin	g imaged rec	eipts: Lost
Expe	nse OIE2	72211 for	enno, sees	es (acoura USD)						
							A	oprove Reject	Reassign	Request Information
Fron T Ser Du I Inst Pleas	m Wallace, nt 15-Mar-3 le 20-Mar-3 D 5588848 ructions le approve or	Starson Lisa 2016 16:23:44 2016 16:23:44 35 reject this expen	se report. Please	Expense Report for Individual's ORG Purpose Expense Report Total Attachments provide a Note if you reject.	g, Steven Bology Journ 32 BSD					
Corp	orate Cred	it Card Expens	es: Business Ex	(penses		T	F			
Line	Date	Expense Type	Merchant Name	Reimbursable Amount (USD)	Justification	Imaged Receipt Required	Accounts Updated	Attachments	Account	
1	16-Feb-2016	Supplies-Food & Beverage	LEBANON	44.32			Yes	Ú)a	20112320.272593	90.,3908050.0003.7903
2	02-May-2015	5 * Lodging- Domestic	HOLIDAY INN BURLINGTON	240.00		~				78.994000.0000.8143
	Total	1		284.32	2					
Acti	on History									
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1	15-Mar-2016	5 16:23:44 Su	Ibmit		Wallac	e <u>, Lisa</u>				
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	Expense Rep	ort Details								
Res	ponse No	ote								
Return	to Worklist blay next noti	fication after my r	esponse				A	oprove Reject	Reassign	Request Information

Approver - Oracle iExpense Expense Reports

- Click 'Reassign' to Reassign the Expense Report to another Approver
- Begin to type the last name of the employee and list of values will populate. Click the name of the new Approver
- Add any comments that would be useful for the new Approver

Dartmouth Expense Reports	a	्रि	Home Logout Preferences Help Expenses
Expenses Home Expense Search Credit Card Transactions Assign Delegates			
Expenses: Expenses Home > Notification Details > Reassign Notifications			
Reassign Notification: Expense OIE272211 for (284.32 USD)			
Use 'Delegate' to give another user authority to respond to a notification on your behalf, while still retaining ownership * Indicates required fieldthat notification. * Assignee All Employees and Users © Delegate your response Name User Name Email © Delegate your response One Notification Megan.E.Tompkins@Dart	or 'Transfer' to give anot mouth.edu	her user complete own	ership of and responsibility for <u>Cance</u>
Comments	1-1 >	.4	

Return to Worklist

Cancel Submit

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