Expense Approval Workflow - R12

Expense Report Approval

Expense report approval is an activity flow that begins when an employee submits an expense report for approval. An approval notification is then sent by the application to the employee's approver, typically a manager or a supervisor, who reviews the request for approval and takes appropriate approval action.

Expense report approval is an activity flow that consists of the following actions:

- The employee submits an expense report.
- The approver receives an approval request.
- The approver takes approval action.

Employee Submits an Expense Report

The employee enters expenses in the expense report, following company policies, and then submits the completed report for approval.

Approver Receives an Approval Request

The approver receives an approval request in the form of a notification that appears in the BPM Worklist or by E-Mail, based on setup. Configurable approval rules are set up by the expense manager in Oracle Fusion Approvals Management to enable routing rules for expense approval by the appropriate approval authority. Expense report approval can take the following forms:

- Approval based on supervisor hierarchy, position hierarchy, cost center managers, or project managers.
- Approval based on templates, where the approval notification is sent to the applicable approver of the template that was used to create at least one expense item in the expense report.

Approver Takes Approval Action

If the approver is set up to receive approval requests through the BPM Worklist, the approver can take the following approval actions:

- Approve the expense report.
- Reject the expense report.
- Request more information about anything in the expense report, usually expense items.
- Delegate approval of the expense report to a selected user who acts on the approver's behalf temporarily.
- Transfer approval ownership of the expense report to another person or group permanently.

If the approver is set up to receive E-Mail approval requests, the approver can only take the following approval actions:

- Approve the expense report.
- Reject the expense report.

Configuring Approval Rules

Approval rules are configurable rules for expense report approval. Oracle Fusion Expenses supports flexible and configurable approval rules for expense report approval using the Approvals Management Extensions (AMX) of the Oracle Service-Oriented Architecture (SOA) suite and Oracle Business Process Management Suite (BPM). BPM provides the interface to administer the approval rules. A BPM Worklist administrator, such as a user with the Financial Application Administrator (FUN_FINANCIAL_APPLICATION_ADMINISTRATOR) role can access the approval rules in the BPM Worklist.

When you submit an expense report, Expenses invokes the expense report approval process, which in turn invokes a set of approval rules created in AMX to build the list of approvers. AMX then sends out approval notifications to the approvers every time it receives a response to an approval notification. AMX sends out approval notifications to the next set of approvers in the approval list. This process is repeated until all approvals are complete.

The approval rules are managed through the BPM Worklist application. Users who are authorized to manage the approval rules see an Administration link displayed in the upper right corner of the application. To create new rules or modify existing rules, click the Administration link, click the Task Configuration tab, click the Data Driven tab, and then select the FinExmWorkflowExpenseApproval approval flow in the left panel.

The expense approval flow contains the following predefined rulesets:

- Approval by supervisor based on report amount
    - Additional serial approval rules for configuration
    - Additional parallel approval rules for configuration
- Approval by project managers in parallel mode
- Approval by cost center owners in parallel mode
- Approval by a specialist based on expense types in parallel mode
- Approval by project managers in serial mode
- Approval by cost center owners in serial mode
- Approval by a specialist based on expense types in serial mode

Approval by Supervisor Based on Report Amount

The predefined ruleset for approval of expense reports using the supervisory hierarchy is called ExpenseReportApprovalStage : ExpenseReportRuleSet. The predefined rules include the following:

- Approval of expense reports with report total over 1000 by the immediate supervisor
- Automatic response for all expense reports with report total equal to or less than 1000

You can change the predefined rules, delete the rules, or add additional rules as needed. The following table lists the parameters for the ExpenseReportApprovalStage : ExpenseReportRuleSet ruleset.

Rule	Field	Predefined Value	Description
ExpenseReportManagerApprovalRule	Condition	Expense Report.Expense Report Total	Attribute that stores the expense report total in the reimbursement currency.
	List Builder	Supervisory	Uses the supervisory hierarchy to retrieve approvers.
	Response Type	Required	The approval notification requires a response.
	Number of levels	1	The number of supervisory levels required for approval completion.
	Starting Participant	HierarchyBuilder.getManager("supervisory",Task.creator,-1,"","")	Determination of applicable approvers starts from the person on the expense report.
	Top Participant	HierarchyBuilder.getPrincipal("FINUSER30",-1,"","")	The last approver in the approval chain. Approval does not go beyond this participant in a hierarchy. To use this rule as is, you must change the predefined last approver user name to the last approver in your organization.
	Auto Action Enabled	False	Automatic approval action is disabled.
	Auto Action	Null	There is no automatic approval action.
ExpenseReportAutoApprovalRule	Condition	Expense Report.Expense Report Total	Attribute that stores the expense report total in the reimbursement currency.
	List Builder	Supervisory	Uses the supervisory hierarchy to retrieve approvers.
	Response Type	Required	The approval notification requires a response.
	Number of levels	1	The number of supervisory levels required for approval completion.
	Starting Participant	HierarchyBuilder.getPrincipal("workflowsystem",-1,"","")	Determination of applicable approvers starts from the person on the expense report.
	Top Participant	HierarchyBuilder.getPrincipal(Task.creator,-1,"","")	The last person in the approval chain is the person on the expense report.
	Auto Action Enabled	True	Automatic approval is enabled.
	Auto Action	Approve	The response is set to Approve.

Additional Serial Approval Rules for Configuration: An additional predefined ruleset for serial approval is called ExpenseReportApprovalStage : CustomSerialParticipantRule. This ruleset does not contain any predefined rules. You can use this ruleset for any additional combination of approval rules that needs to be executed sequentially with respect to the rules in ExpenseReportApprovalStage : ExpenseReportRuleSet.

Additional Parallel Approval Rules for Configuration: An additional predefined ruleset for parallel approval is called ExpenseReportApprovalStage : CustomParallelParticipantRule. This ruleset does not contain any predefined rules. You can use this ruleset for any additional combination of approval rules that needs to be executed in parallel to the rules in ExpenseReportApprovalStage : ExpenseReportRuleSet.

Approval by Project Managers in Parallel Mode

The predefined ruleset for approval of expense reports by project managers is called ProjectManagerApprovalStage : ProjectManagerRuleSet. This ruleset has a single predefined rule. The rule says that if the total amount charged to projects is more than zero, the expense report is sent to the project manager for approval. Further, if expenses are charged to more than one project, the applicable project managers receive the approval notification in parallel. The approval is complete when all project managers identified as approvers have approved the expense report.

You can change the predefined rules, delete the rules, or add additional rules as needed. The following table lists the parameters for the ProjectManagerApprovalStage : ProjectManagerRuleSet ruleset.

Rule	Field	Predefined Value	Description
ProjectManagerApprovalRule	Condition	ExpenseReport/projectTotalVO.total	Attribute that stores the total expense charged against each project in an expense report. The view object only stores details for expense reports that contain projects.
	List Builder	Resource	Static list of approvers.
	Response Type	Required	The approval notification requires a response.
	Participants	ExpenseReport/projectTotalVO.managerUsername	The approver of the expense report is the project manager.

Approval by Cost Center Owners in Parallel Mode

The predefined ruleset for approval of expense reports by cost center owners is called CostCenterApprovalStage : CostCenterRuleSet. This ruleset has the following predefined rules:

- If the total amount charged to cost centers other than the employee's default cost center is more than zero, the expense report is sent to the cost center owner for approval.
  - If expenses are charged to a cost center other than the employee's default cost center, the applicable cost center owners receive the approval notification in parallel. The approval is complete when all cost center owners identified as approvers have approved the expense report.
- If the cost center of the expenses is the same as the default cost center of the employee, automatic response is generated indicating that there is no cost center-specific approval.

You can change the predefined rules, delete the rules, or add additional rules as needed. The following table lists the parameters for the CostCenterApprovalStage : CostCenterRuleSet ruleset.

Rule	Field	Predefined Value	Description
CostcenterIsNotEmpDefaultCostcenterRule	Condition	ExpenseReport/costCenterTotalVO.costCenter	Attribute that stores the cost centers in the expense report.
	Condition	Task.payload.empDefaultCostCenter	Default cost center of the employee.
	List Builder	Resource	Static list of approvers.
	Response Type	Required	The approval notification requires a response.
	Participants	ExpenseReport/costCenterTotalVO.managerUsername	The approver of the expense report is the cost center owner.
CostcenterIsEmpDefaultCostcenterRule	Condition	ExpenseReport/costCenterTotalVO.costCenter	Attribute that stores the cost centers in the expense report.
	Condition	Task.payload.empDefaultCostCenter	Default cost center of the employee.

	List Builder	Supervisory	
	Response Type	Required	The approval notification requires a response.
	Number of levels	1	The number of supervisory levels required for approval completion.
	Starting Participant	HierarchyBuilder.getPrincipal("workflowsystem",-1,"","")	Start from the person on the expense report.
	Top Participant	HierarchyBuilder.getPrincipal(Task.creator,-1,"","")	The last person in the approval chain is the person on the expense report.
	Auto Action Enabled	True	Automatic approval is enabled.
	Auto Action	Approve	The response is set to Approve.

Approval by a Specialist Based on the Expense Types in Parallel Mode

The predefined ruleset for approval of expense reports based on the template name or any attributes of the expense type is called ExpenseApprovalStage : ExpenseRuleSet. This ruleset has the following predefined rules:

- If the template name for any of the expenses is Relocation Expenses, then the expense report is routed to approval by a predefined user.
- If the expense reports do not contain any expenses with the expense template Relocation Expenses, then an automatic approval response is generated indicating that there is no special approval.

You can change the predefined rules, delete the rules, or add additional rules as needed. The following table lists selected parameters for the ExpenseApprovalStage : ExpenseRuleSet ruleset.

Rule	Field	Predefined Value	Description
ExpenseTypeIsRelocationExpensesRule	Condition	ExpenseReport/expenseVO.expenseTemplateName	Attribute that stores the cost centers in the expense report.
	List Builder	Resource	
	Response Type	Required	The approval notification requires a response.
	Participants	User ID of the approver	
ExpenseTypeIsNotRelocationExpensesRule	Condition	ExpenseReport/expenseVO.expenseTemplateName	Auto approval enabled with the same list builder criteria as ExpenseReportAutoApprovalRule.

Approval by Project Managers in Serial Mode

The predefined ruleset for approval of expense reports in serial mode by project managers is called SerialProjectManagerApprovalStage : SerialProjectManagerRuleSet. This ruleset contains the same rule as the rule for approval by project managers in parallel, but the ruleset is configured to send out the approval notifications sequentially to the approvers in the list. Each notification to a subsequent approver is sent only after the current approver approves the expense report. If the current approver rejects the expense report, the approval process is complete and the expense report is returned to the user.

Approval by Cost Center Owners in Serial Mode

The predefined ruleset for approval of expense reports by cost center owners is called SerialCostCenterApprovalStage :

SerialCostCenterRuleSet. This ruleset contains the same rule as the parallel approval, but the ruleset is configured to send out the approval notifications sequentially to the approvers in the list. Each notification to a subsequent approver is sent only after the current approver approves the expense report. If the current approver rejects the expense report, the approval process is complete and the expense report is returned to the user.

Approval by a Specialist Based on Expense Types in Serial Mode

The predefined ruleset for approval of expense reports based on a template name or any attributes of the expense type is called SerialExpenseApprovalStage : SerialExpenseRuleSet. The ruleset contains the same rule as the parallel approval, but the ruleset is configured to send out the approval notifications sequentially to the approvers in the list. Each notification to a subsequent approver is sent only after the current approver approves the expense report. If the current approver rejects the expense report, the approval process is complete and the expense report is returned to the user.

Defining Approval Rules

Approval rules are configurable rules for expense report approval created in Approval Management Extensions (AMX). Oracle Fusion Expenses provides nine predefined rulesets. By using the BPM Worklist, you can define new approval rules or modify existing ones in AMX. To manage approval rules, you must be a BPM Worklist administrator, such as a financial application administrator.

If you are authorized to manage the approval rules, you can:

- Modify existing approval rules
- Define new approval rules
- Understand and apply properties of rules and rulesets

If you are authorized to manage the approval rules, an Administration link displays in the upper right corner of the BPM Worklist. To define new approval rules or modify existing ones, click the Administration link, click the Task Configuration tab, click the Data Driven tab to display the Data driven configuration page, and then select the FinExmWorkflowExpenseApproval task from the left hand pane named Tasks to be configured.

Each ruleset contains one or more approval rules. Each approval rule has an approval condition and a list of approvers. The list of approvers derived for each ruleset is called a participant. To generate the list of approvers, each rule requires a list builder to be associated with it.

Each expense report can only satisfy one rule within a ruleset. If an expense report does not satisfy any rule in a ruleset, the approval process errors and an incident is reported in Oracle Enterprise Manager Grid Control.

Modify Existing Approval Rules

In the Data driven configuration page, select a ruleset to modify and click the Edit icon in the Tasks to be configured pane. You can now add, modify, or delete rules within the specified ruleset. The changes take effect when you click the Commit Task icon in the Tasks to be configured pane. Saving changes by clicking the Save icon saves the changes, but it does not activate them. If needed, you can undo changes by clicking the Reset icon.

Define New Approval Rules

To create new rules, you must provide values for the following rule components:

- Condition: Criteria that an expense report must satisfy
- Response type: Required or FYI. A response from the approver is required or the notification is informational.
- List builder: Creates a list of approvers for a specific notification

To define a condition, select a value from the list of values in the left-most condition field in the IF region. The Condition Browser displays. In the Condition Browser, open a view object (folder) and select the attribute that you want to use as the criteria. You can add multiple conditions to a rule. An example of a condition is: ExpenseReport.expenseReportTotal more than 1000.

The following table lists view objects (folders) that are visible in the Condition Browser with their associated attributes and descriptions.

Note

The values in this table are the only ones that are relevant for you to select as conditions for expense report approval rules.

View Object in Condition Browser	Attribute	Description
ExpenseReport	ExpenseReportId	Expense report identifier
ExpenseReport	PersonId	Person identifier of the employee on the expense report
ExpenseReport	AssignmentId	Primary assignment identifier of the employee's assignment
ExpenseReport	ExpenseReportDate	Date of the latest expense in the expense report
ExpenseReport	ExpenseReportTotal	Total amount of the expense report in the reimbursement currency
ExpenseReport	ReimbursementCurrencyCode	Expense report reimbursement currency code
ExpenseReport	ReportSubmitDate	Date on which the expense report was submitted for approval
ExpenseReport	ExpenseStatusCode	Most recent status of the expense report
ExpenseReport	ExpenseStatusDate	Date of the most recent status of the expense report
ExpenseReport	OrgId	Business unit identifier of the expense report
ExpenseItem	ReceiptAmount	Expense amount in receipt currency
ExpenseItem	ReceiptCurrencyCode	Currency code of the expense amount
ExpenseItem	ExpenseSource	Source of the expense item, cash, or corporate card
ExpenseItem	ExpenseTypeCategoryCode	Category of the expense item, such as Airfare or Accommodations
ExpenseItem	ExpenseCategoryCode	Classification of expense item, such as Business or Personal
ExpenseItem	ExpenseTemplateId	Expense template identifier for the expense item
ExpenseItem	ExpenseTypeId	Expense type identifier of the expense item
ExpenseItem	PolicyViolatedFlag	Flag that indicates whether the expense item has policy violations
ExpenseItem	ReceiptMissingFlag	Flag that indicates whether the user has the original receipt
ExpenseItem	EmpDefaultCostCenter	Default cost center of the employee
CostCenterTotal	ExpenseReportId	Expense report identifier
CostCenterTotal	CostCenter	Cost center against which the expense is incurred
CostCenterTotal	Total	Total expense charged to the cost center
CostCenterTotal	ManagerId	Person identifier of the cost center owner

CostCenterTotal	ManagerUsername	User name of the cost center owner
ProjectTotal	ExpenseReportId	Expense report identifier
ProjectTotal	PjcProjectId	Project identifier
ProjectTotal	Total	Total expense charged to the project
ProjectTotal	ProjectPartyId	Person identifier of the project manager
ProjectTotal	ManagerUsername	User name of the project manager

Each approval notification generated from an approval rule must have a response type of Required or FYI. You specify the applicable response type in the THEN region on the Data driven configuration page of the BPM Worklist. If the approver should take an action in response to the notification, click the Required radio button. If the approval notification is designed as information only, click the FYI radio button.

Each rule requires a list builder to build the list of approvers. The following table shows the list builder types that are available in the BPM Worklist with their associated descriptions.

List Builder Type	Description
Supervisory	Ascends the primary supervisory hierarchy, starting at the expense report submitter or at a given approver, and generates the approval chain.
Job Level	Ascends the supervisory hierarchy, starting at a given approver and continuing until an approver with the appropriate job level is found.
Position	Ascends the position hierarchy, starting at a given approver's position and continuing until an approver with the appropriate position is found.
Resource	A list of approvers. You can choose a user name or a function that returns a set of approvers.
Approval Group	Group of approvers. You can create approver groups consisting of a list of users for use in the rulesets.

Each list builder type requires values for specific fields to build its approval list. In the THEN region on the Data driven configuration page of the BPM Worklist, select a type of list builder from the List Builder drop-down list and click the **Create Action** button. The Add Variable dialog box displays where you add specific variables for specific list builders.

The following table indicates the fields associated with each list builder type for which you must select specific values.

List Builder Type	Field	Description	Values to Select and Sample Data
Supervisor	Number of Levels	A positive number specifying the number of levels to traverse the supervisory hierarchy.	A positive number based on your needs. For example, use 1 for one level of approval.

Supervisor	Starting Participant	The first participant in the list.	From the Add Variable dialog box, select: • The **Get Manager** radio button • **Supervisory** as the **List Builder** • **Reference User** as **task.creator** to start from the person on the expense report • An **Effective Date** if applicable This creates the following string for the start participant: HierarchyBuilder.getManager("supervisory",Task.creator,-1,"",""").
Supervisor	Top Participant	The last participant in the list. The approval list does not go beyond this person in a hierarchy.	From the Add Variable dialog box: • Select the **Get User** radio button. • Enter the user name of the last person in the approval chain as the **Reference User**. • Select an **Effective Date** if applicable. This creates the following string as the top participant: HierarchyBuilder.getPrincipal("<>",-1,"","")
Supervisor	Auto Action Enabled	If automatic response should be enabled for the approval notification, set to True.	
Supervisor	Auto Action	If automatic response is enabled, set the response.	For expense approval, use Approve.
Position	Number of Levels	A positive number specifying the number of levels to traverse the position hierarchy. This number can be an absolute value or a value relative to the **Starting Point** or **Creator**.	
Position	Relative to	The number of levels to traverse is relative to one of the following values: **Starting Point**, **Creator**, or **Absolute**.	• At most **2** relative to **Starting Point** • At least **2** relative to **Starting Point**.
Position	Starting Participant	The first participant in the list.	To select a starting participant, click the list of values and select: • The **Get Manager** radio button • **Position** as the **List Builder** • **Reference User** as the position identifier of the starting position • A **Hierarchy Type**. This is a mandatory selection for the position list builder. To select a hierarchy type, you must first define a position hierarchy in Oracle Fusion Global Human Resources. • An **Effective Date** if applicable This creates a string for the starting participant. For example, to start from position id 1234, use HierarchyBuilder.getManager("position","1234",-1,""," ENTERPRISE_POSITION_HIERARCHY") as the start participant.
Position	Top Participant	The last participant in the list. The approval list does not go beyond this person in a hierarchy.	From the Add Variable dialog box: • Select the **Get User** radio button. • Enter the position identifier for the last position in the approval chain as the **Reference User**. • Select an **Effective Date** if applicable. This creates a string for the top participant. For example, HierarchyBuilder.getPrincipal"<>",""," ENTERPRISE_POSITION_HIERARCHY").

Position	Utilized Participants	Uses only the participants specified in this option from the calculated list of participants. Available options are: **Every one**, **First and Last Manager**, **Last Manager**.	
Position	Auto Action Enabled	If automatic response should be enabled for the notification, set to True.	
Position	Auto Action	If automatic response is enabled, set the response.	For expense approval, use Approve.
Job Level	Number of Levels	A positive number specifying the number of levels to traverse the job level hierarchy. This number can be an absolute value, or a value relative to **Starting Point** or **Cr eator**.	
Job Level	Relative to	The number of levels to traverse is relative to one of the following values: **Starting Point**, **Creator**, or **Absolute**.	• At most **2** relative to **Absolute** • At least **1** relative to **Absolute**
Job Level	Starting Participant	The first participant in the list.	From the Add Variable dialog box, select: • The **Get User** radio button • **Job Level** as the **List Builder** • **Reference User** as **task.creator** to start from the person on the expense report • An **Effective Date** if applicable This creates a string for the start participant. For example, HierarchyBuilder.getManager("joblevel",task.creator,-1,"",").
	Top Participant	The last participant in the list. The approval list does not go beyond this person in a hierarchy.	From the Add Variable dialog box: • Select the **Get User** radio button. • Enter the user name for the last approver in the approval chain as the **Reference User**. • Select an **Effective Date** if applicable. This creates the following string as the top participant: HierarchyBuilder.getPrincipal("<>",-1,"","")
Job Level	Include all managers at last level	If the job level equals that of the previously calculated last participant in the list, then it includes the next manager in the list.	
Job level	Utilized Participants	Uses only the participants specified in this option from the calculated list of participants. Available options are: **Every one**, **First and Last Manager**, **Last Manager**.	
Job Level	Auto Action Enabled	If automatic response should be enabled for the approval notification, set to True.	
Job level	Auto Action	If automatic response is enabled, set the response.	For expense approval, use Approve.
Resource	Participants	Participants can be users, groups, or application roles. For users, use a static user name or a function to retrieve a user name.	For example, use ExpenseReport/costCenterTotalVO.managerUsername for cost center owner.
Approval Group	Approval Group	Enter the approval group name. To select an approval group as a list builder, you must create the static approval groups in the BPM Worklist.	

For more information on configuring approval rules, see the Using Task Configuration section of the Using Approval Management chapter in the Oracle Fusion Middleware Modeling and Implementation Guide.

Understand and Apply Properties of Rules and Rulesets

The following are properties of rules and rulesets that you need to understand and apply.

- New rulesets can only be created using JDeveloper.
- For each expense report, one rule must be true within each ruleset. If the expense report does not satisfy any rule in the ruleset, the approval process will error.
- Since there can be only one rule that applies in a ruleset for each expense report, you must configure the rules at the most granular level applicable and use priority within the rule to differentiate overlapping conditions. AMX does not support nested conditions.
- All rulesets are executed in parallel or in serial with respect to the Expense Report Approval Stage.
- Serial rulesets are designed to execute the approval process in a sequential order. The approvers in the approval list for any rule included in these rulesets are notified in a sequential order.
- To deactivate a ruleset, check the **Ignore this participant** checkbox for that ruleset.
- If the participants cannot be determined, then AMX sends out a failure notification to the user with an incident identifier. Administrators can access the incident details through the Support Workbench of the Oracle Enterprise Manager Grid Control application and restart the approval process in Oracle Enterprise Manager Grid Control after resolving the issues in the incident report.

Setting Up Approval Rules for Delegated Expense Reports

Oracle Fusion Expenses enables you to delegate expense entry to another person. To understand the approval process for delegated expense reports, it is necessary to understand the distinction between preparer, or creator, and owner. The person who submits an expense report for another person is called the preparer. The person who incurs the expenses is called the owner of the expense report.

Expenses provides predefined approval rules to support delegated expense report approval. When a preparer submits an expense report, the following approval process ensues.

- Approval by expense report owner
  In the first part of the approval process, the expense report is routed to the expense report owner for approval. The expense report has a status of Pending Individual Approval. The rule set for this part of the approval process is called the ExpenseReportApprovalStageExpenseReportD : ExpenseReportOwnerRuleSet in the BPM Worklist application.
- Approval by preparer's manager
  In the second part of the approval process, the expense report is routed to the preparer's manager hierarchy for approval. The Expense report has a status of Pending Manager Approval. The rule set for this part of the approval process is called ExpenseReportApprovalStage : ExpenseReportRuleSet in the BPM Worklist application.

This topic discusses the following two scenarios that require you to modify the rule sets if your company enables delegated expense entry.

- Bypass approval by owner
- Start approval with owner's manager

Based on your company policies, any one of the following scenarios can apply:

- Only bypass approval by owner
- Only start approval with owner's manager
- Both bypass approval by owner and start approval with owner's manager
- Neither bypass approval by owner nor start approval with owner's manager

Bypass Approval By Owner

If your company policy does not require expense report approval by the expense report owner, you can modify the rule set to bypass this approval. When bypassed, the expense report status is set to Pending Manager Approval. The expense report is routed to approvers based on the existing approval rules.

To bypass approval by the owner, perform the following steps:

1. Navigate to the Oracle BPM Worklist application.

2. Click the Administration link displayed in the upper right corner of the page. The Administration tab appears.
3. Click the Task Configuration tab.
4. Click the Rules tab.
5. In the Tasks to be configured pane, select the FinExmWorkflowExpenseApproval task.
6. From the Select Ruleset choice list, select the following predefined rule set: SoaOLabel.ExpenseReportApprovalStageExpenseReportD : ExpenseReportOwnerRuleSet .
7. On the far right of the page, select the Ignore this participant check box. This action tells the approval rule to ignore the owner as the first approver in the approval rule.
8. To save the modified rule set, click the Save icon in the Tasks to be configured pane.
9. To commit the modified rule set, click the Commit task icon in the Tasks to be configured pane.

Start Approval with Owner's Manager

The approval process routes the expense reports to the preparer's manager hierarchy.

If your company policy requires expense reports to be routed to the owner's manager hierarchy for approval, perform the following steps.

1. To navigate to the expense report approval taskflow, perform steps 1-5 in the preceding section.
2. From the Select Ruleset choice list, select the following predefined rule set: SoaOLabel.ExpenseReportApprovalStage : ExpenseReportRuleSet.
3. Click the Edit task icon (pencil) on the Tasks to be configured pane.
4. Expand the ExpenseReportManagerApproval rule.
5. In the List builder action 1 region, click in the Starting Participant field and scroll to the right until you see ("supervisory",Task.creator,.
6. In the Starting Participant field, replace Task.creator with Task.payload.Expense Report Owner as shown in the following table.

Predefined Value	Changed Value
HierarchyBuilder.getManager("supervisory",Task.creator,-1,"","")	HierarchyBuilder.getManager("supervisory", Task.payload.Expense Report Owner,-1,"","")

7. To save the modified rule set, click the Save icon in the Tasks to be configured pane.
8. To commit the modified rule set, click the Commit task icon in the Tasks to be configured pane.

Caution: Expenses recommends that you evaluate any existing approval rules that use Task.creator as the first approver in an approval hierarchy to determine whether the first approver should be changed from task.creator to Task.payload.Expense Report Owner.

FAQs for Approve Expense Report

What are the expense report approval actions available to me?

Expense report approval actions include the following:

- **Approve**.
- **Reject**.
- **Request Additional Information** from the preparer.
- **Reassign**.

  Note

  The Reassign action has two options: **Delegate Expense Report** to another approver temporarily and **Transfer to Correct Approver** pe rmanently.

How can I request more information on expense reports?

Select the **Actions menu** in the expense report approval notification and choose **Request Additional Information**. This action sends the approval notification to the preparer, requesting additional information.

How can I see all the approvers on an expense report?

The History region of the expense report approval notification shows all the approvers of a particular expense report and the action taken by each.

Can I approve expense reports by E-Mail?

If you are set up to approve expense reports by E-Mail, you can use it to approve or reject them.

How can I see expenses in my own currency?

If expenses were incurred in a foreign currency, the expense report total automatically displays both the reimbursement currency and the approver preferred ledger currency in the Details region of the expense report.

How can I view receipt images in expense reports?

You can fax or E-Mail your expense report receipts to Payables, along with the expense report confirmation page, which contains the unique bar code on your report. Oracle Fusion Document Capture (OFDC) and Oracle Fusion Imaging and Process Management (OFIPM) process, attach, and store the receipt images. The Business Process Execution Language (BPEL) process then initiates the approval flow by sending the approval request notifications to the approvers.

What's the reason I have not been notified of my employee's expense report submission?

An approver may not be notified of an employee's expense report submission for the following reasons:

- The expense report was automatically approved because it was an immaterial amount less than some predefined amount.
- The Approval process could not identify the approver as the employee's supervisor, project manager, or cost center owner, so the expense report approval notification was directed to the administrator.
- The expense report was received by another approver who was identified as the approver for this expense report.
- The preceding approver in the approval flow has not yet approved the expense report.
- A vacation rule is still activated, so the expense report approval notification is forwarded to another approver.

Can I access expense analytics?

Only approvers can access expense analytics that are visible on the right side of expense reports. The analytics include recent similar expenses, recurring violations, and recent returned expense reports associated with the preparer.

Can I see previous expense report submission data to help me with my approval decision?

Yes. On the right side of the expense report approval notification, three tables provide you with historical expense report information for this employee on recent similar expenses, recurring violations, and recent returned expense reports.