

# Setting up an Expense Claim Workflow

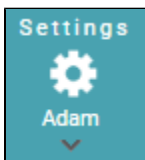
The following workflow will occur when an Expense Claim is created:

- Once the User submits the Expense Claim, the status of the Expense Claim will change to Awaiting Approval
- Finance will receive the Expense Claim workflow under the To Do tab of the Home page
- Finance will approve or decline the Expense Claim
- The User who created the Expense Claim will receive notification when the expense claim is approved or declined. The Expense Claim will be invoiced, and the Supplier Invoice paid
- Notifications will be visible under the Completed tab of the Home page, and will also be received as emails in Outlook.

Below are steps to show you how to set up an Expense Claim Workflow.

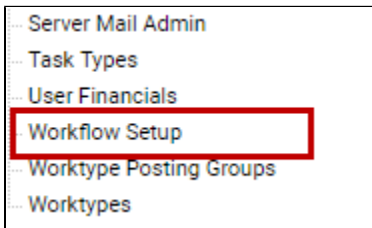
## Step-by-step guide

1. Click the **Settings** button on the Ribbon.



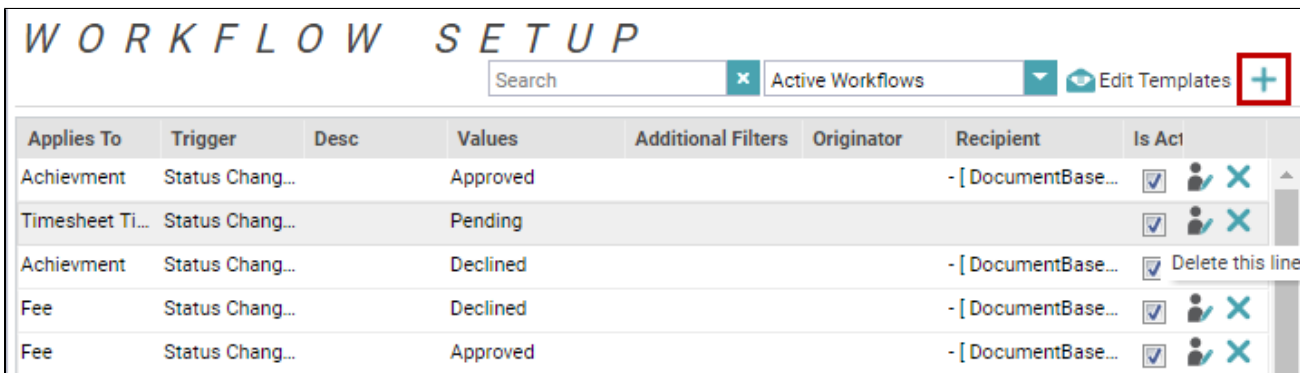
The *Configuration* screen appears.

2. Click on **Workflow Setup** in the Configuration tree.



The *Workflow Setup* screen appears.

3. Click the + (Add New) button on the Toolbar.



The *Set up new / edit existing workflow* dialog appears.

**Set up new / edit existing workflow** [X]

Applies to: [ ]

Trigger: [ ]

< Setup Additional Filters Custom SQL Filter >

WorkFlow Setup Description: [ ]

**Only Initiate Workflow when the following filters apply:**

Originator: {All}

Originator Type: {All}

**Escalation Settings:**

Escalate to Manager:

Escalate to other: {None}

Escalate after (# hours): # hours

Send Emails

Create Cancel

4. Click the drop down arrow on the **Applies to** field, and select **Expense**.

**Set up new / edit existing workflow** [X]

Applies to: [ ]

Trigger: [ ]

< Setup Additional Filters Custom SQL Filter >

WorkFlow Setup Description: [ ]

**Only Initiate Workflow when the following filters apply:**

Originator: [ ]

Originator Type: [ ]

**Escalation Settings:**

Escalate to Manager:

Escalate to other: [ ]

Escalate after (# hours): [ ]

Send Emails

Create Cancel

5. Click the drop down arrow on the **Trigger** field, and select **Status Changed**.

Set up new / edit existing workflow

Applies to: Expense

Trigger: Status Changed

Setup Additional Filters Custom SQL Filter

WorkFlow Setup Description:

Only Initiate Workflow when the following filters apply:

6. Define the action the workflow must take in response to the trigger.

1. Click the drop down arrow on the **When From Value is equal to** field, and select **Any Other**

The Any Other option will allow to edit and resubmit the expense claim when it has been declined. If any other options are selected, the expense claim submitter will not be allowed to re-submit for approval.

2. Click the drop down arrow in the **When To Value is equal to** field, and select **Approve**.
3. Click the drop down arrow on the **Action Type** field, and select **Needs Action**. This means that when a User submits an Expense Claim, a workflow will be kicked off and an action needs to be performed.

Set up new / edit existing workflow

Applies to: Expense

Trigger: Status Changed

When From Value is equal to: {Any Other}

When To Value is equal to: Approved

Action Type: Needs Action

Setup Additional Filters

WorkFlow Setup Description:

7. Click the **Participants** tab to select the Users who need to take action on the expense claim.

Set up new / edit existing workflow

Applies to: Expense

Trigger: Status Changed

When From Value is equal to: {Any Other}

When To Value is equal to: Approved

Action Type: Needs Action

SQL Filter Participant Seq. Groups Participants

WorkFlow Setup Description:

Only Initiate Workflow when the following filters apply:

Originator: {All}

Originator Type: {All}

8. Click the + (Add New) button.

When From Value is equal to: (Any Other) ▼  
When To Value is equal to: Approved ▼  
Action Type: Needs Action ▼

SQL Filter Participant Seq. Groups Participants

+

Seq. gr	Respondent	Action	Required
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A new line is added.

9. Click the drop down arrow on the **Respondent** field, and select the relevant User.

In this example, **Francine** was selected.

When From Value is equal to: (Any Other) ▼  
When To Value is equal to: Approved ▼  
Action Type: Needs Action ▼

SQL Filter Participant Seq. Groups Participants

+

Seq. gr	Respondent	Action	Required
1	▼	Approve / Dec...	<input type="checkbox"/>

Dewald Troskie  
dsaffdsa23323233333  
Francine  
Full  
Hein Kotze

By default, the **Action** field displays **Approve / Decline** as the action to be taken by the selected User.

10. Check the **Required** checkbox.

Seq. gr	Respondent	Action	Required
1	Francine	Approve / Dec...	<input type="checkbox"/>

11. Click the **Create** button.

**Set up new / edit existing workflow** ✕

Applies to:

Trigger:

When From Value is equal to:

When To Value is equal to:

Action Type:

Seq. gr	Respondent	Action	Required
1	Francine	Approve / Dec...	<input checked="" type="checkbox"/>

Send Emails  Active

Create
Cancel

The Expense Claim Workflow appears on the *Workflow Setup* screen, and it will be kicked off once an Expense Claim is submitted.

# WORKFLOW SETUP

x
Active Workflows
▼
🔗 Edit Templates
+

Applies To	Trigger	Desc	Values	Additional Filters	Originator	Recipient	Is Act
Custom Text D...	Manual Invoca...	Request Agen...				- [ Document Client...	<input checked="" type="checkbox"/>
Job Bag	New Entry					- [ Client Invoice C...	<input checked="" type="checkbox"/>
Expense	Status Changed something or ...	{Any Other} to App...				Francine	<input checked="" type="checkbox"/>
InHouse PO	Status Changed	{Any Other} to Che...				- [ Creditors Clerks ]	<input checked="" type="checkbox"/>
Sub Tasks	New Task Allo...	Tasking Workfl...				- [ Sub Task Assign...	<input checked="" type="checkbox"/>

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