Setting up an Expense Claim Workflow

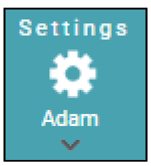
The following workflow will occur when an Expense Claim is created:

- 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.

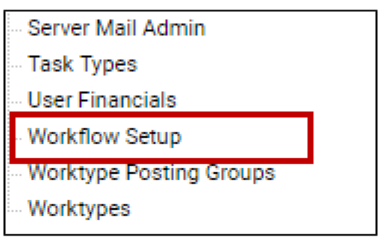
Step-by-step guide

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



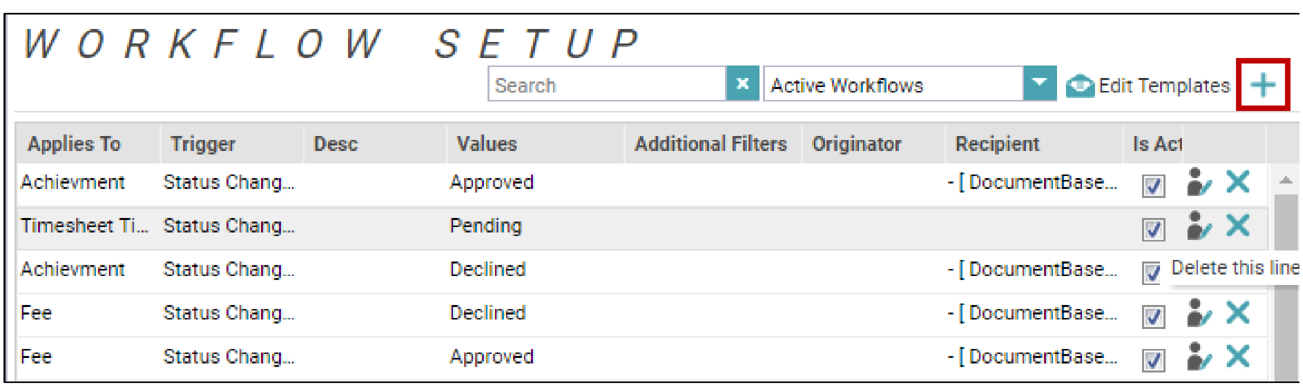
The *Configuration* screen appears.

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

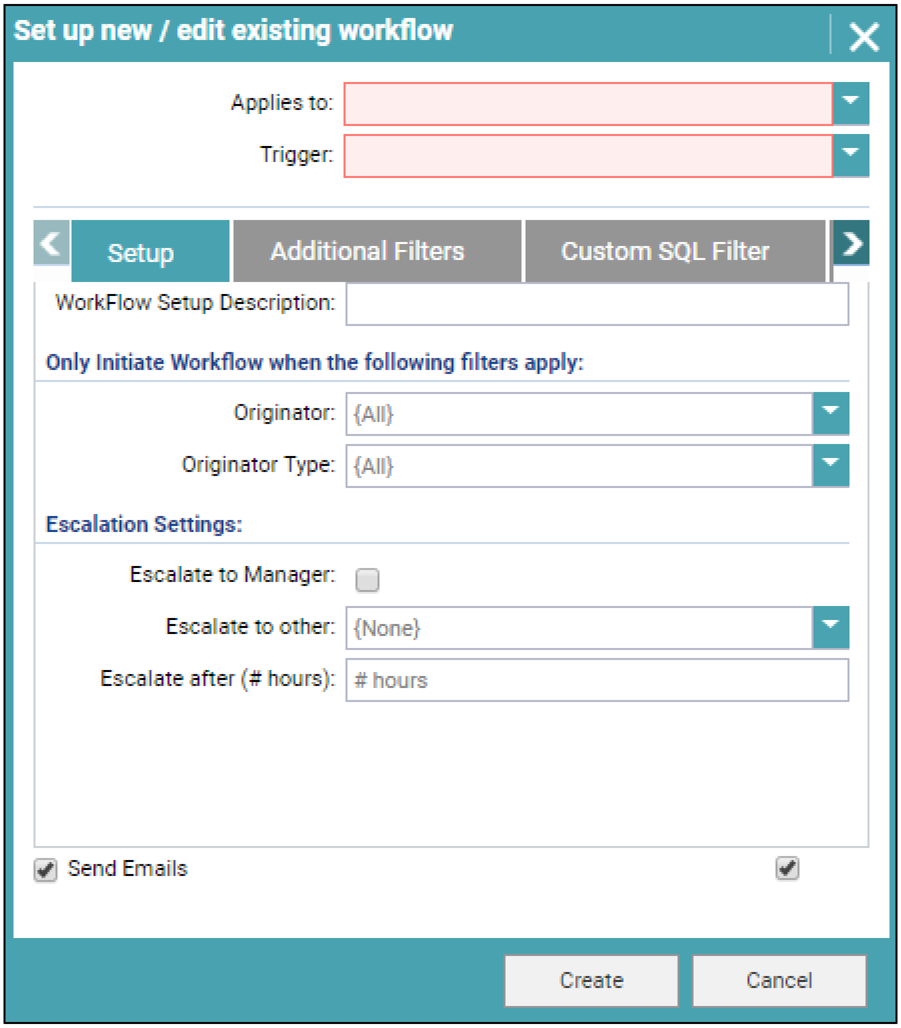


The *Workflow Setup* screen appears.

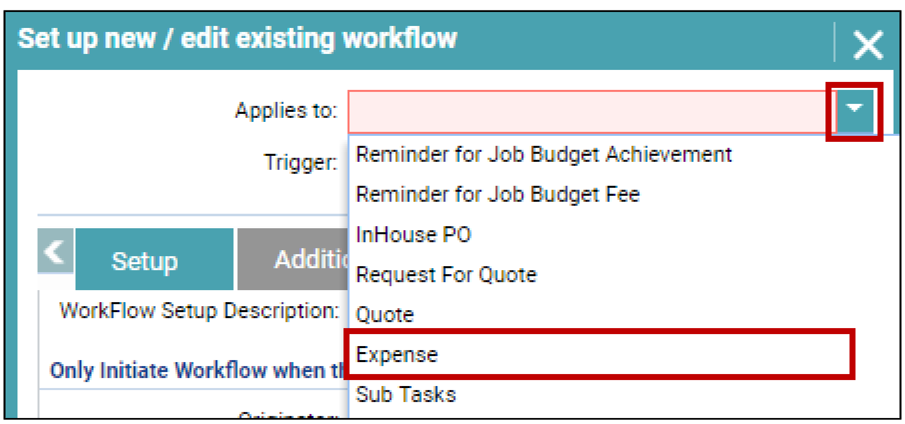
3. Click the **+** (Add New) button on the Toolbar.



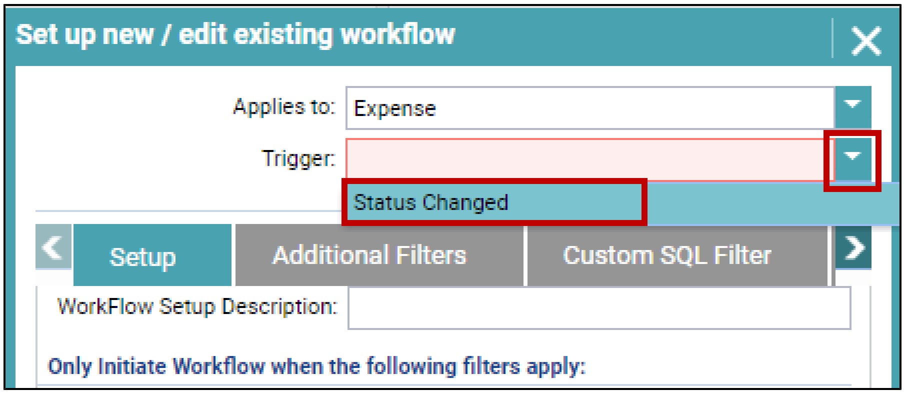
The *Set up new / edit existing workflow* dialog appears.



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



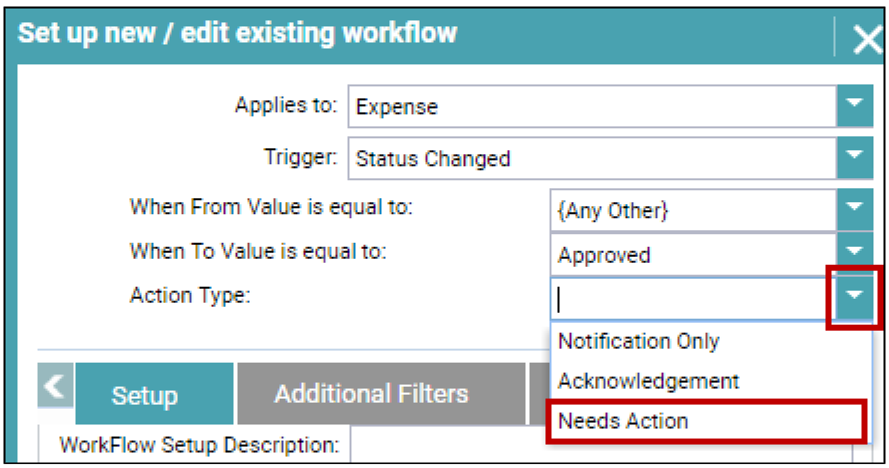
5. Click the drop down arrow on the **Trigger** field, and select **Status Changed**.



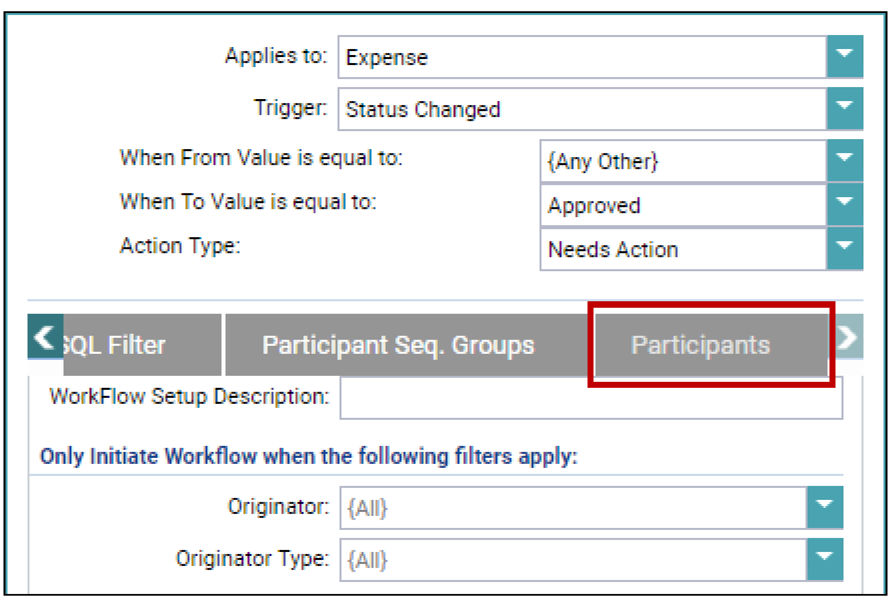
6. Define the action the workflow must take in response to the trigger.
    1. Click the drop down arrow on the **When From Value is equal to** field, and select **Any Other**

    > 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.

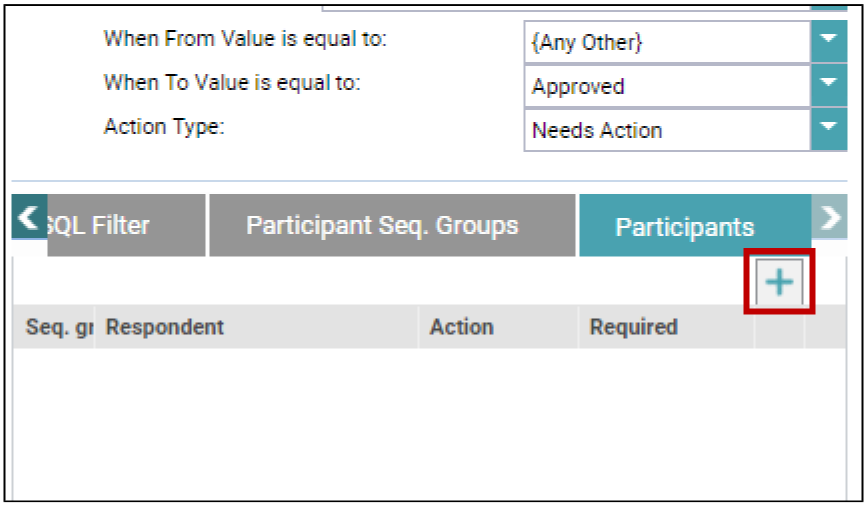
    2. Click the drop down arrow in the **When To Value is equal to** field, and select **Approve**.
    3. Click the drop down arrow on the **Action Type** field, and select **Needs Action**. This means that when a User submits an Expense Claim, a workflow will be kicked off and an action needs to be performed.



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



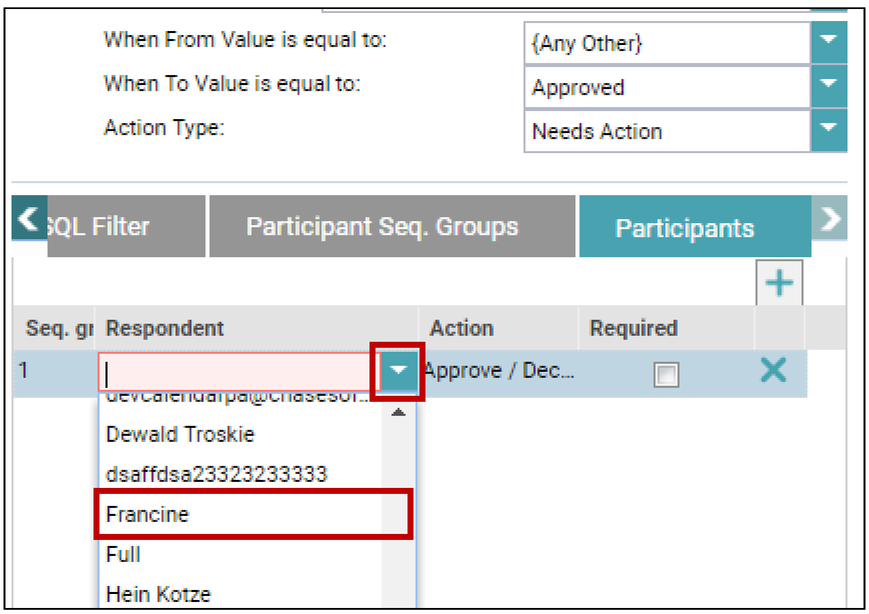
8. Click the **+** (Add New) button.



A new line is added.

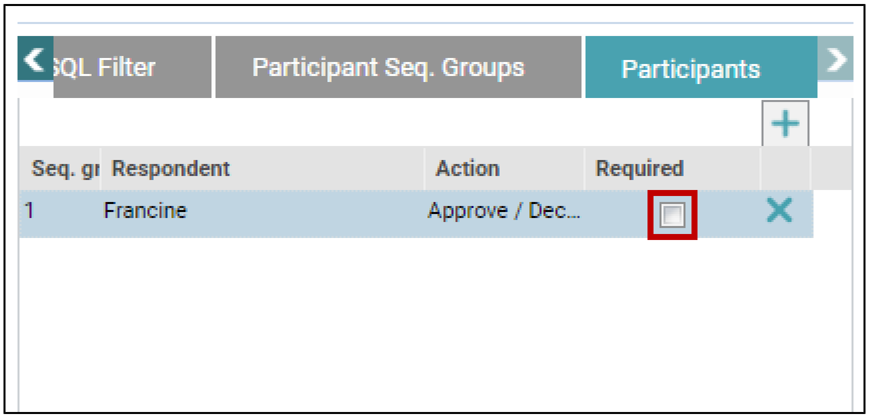
9. Click the drop down arrow on the **Respondent** field, and select the relevant User.

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

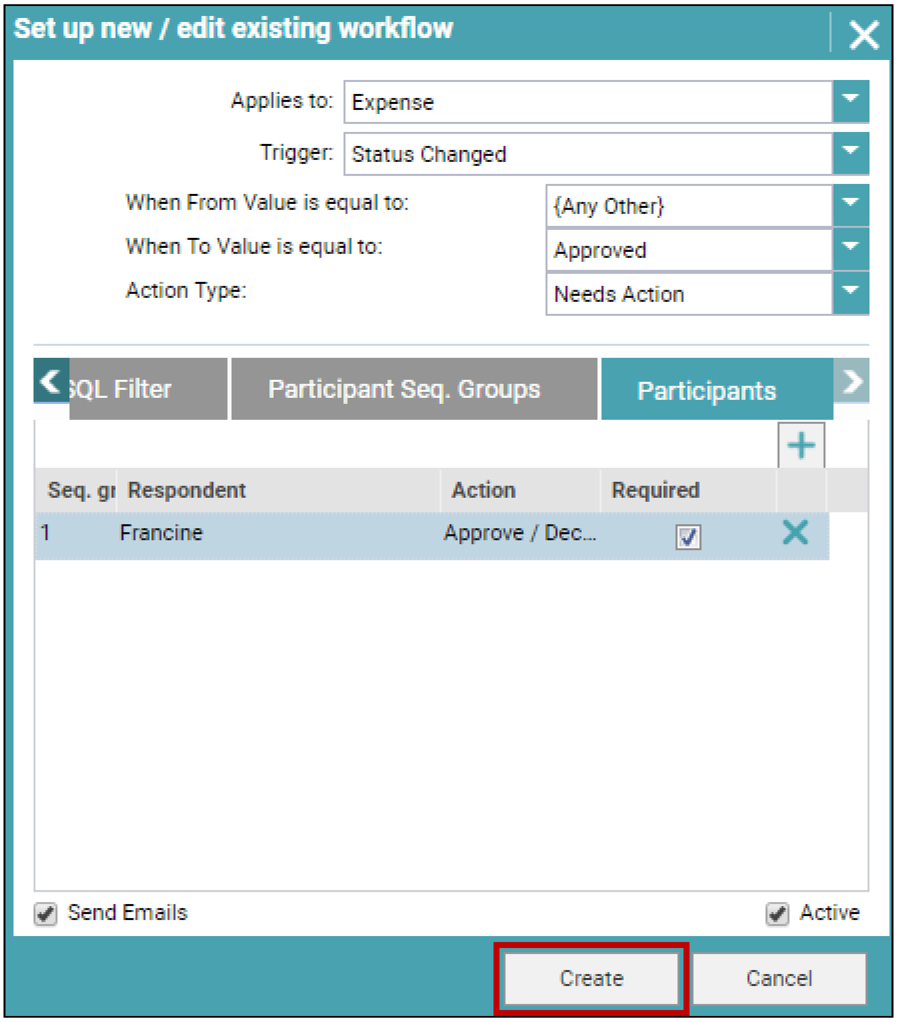


By default, the **Action** field displays **Approve / Decline** as the action to be taken by the selected User.

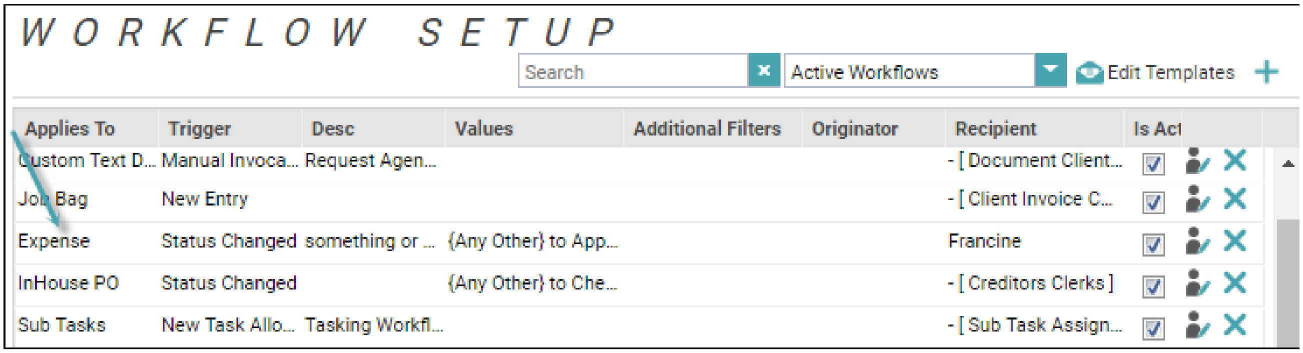
10. Check the **Required** checkbox.



11. Click the **Create** button.



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



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