# Expense Report Actions: Review/Request/Approvals/Rejections
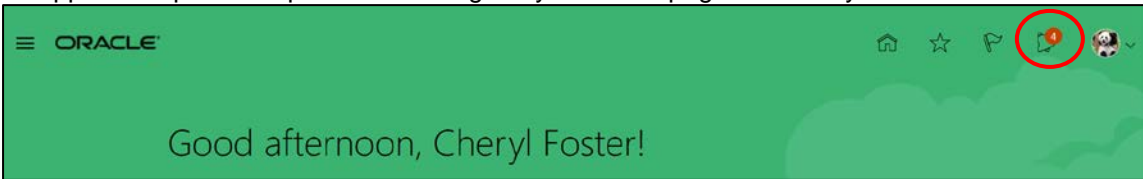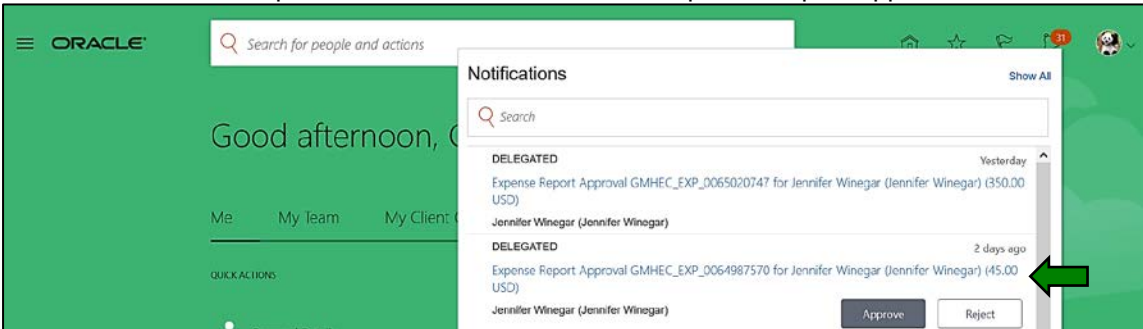
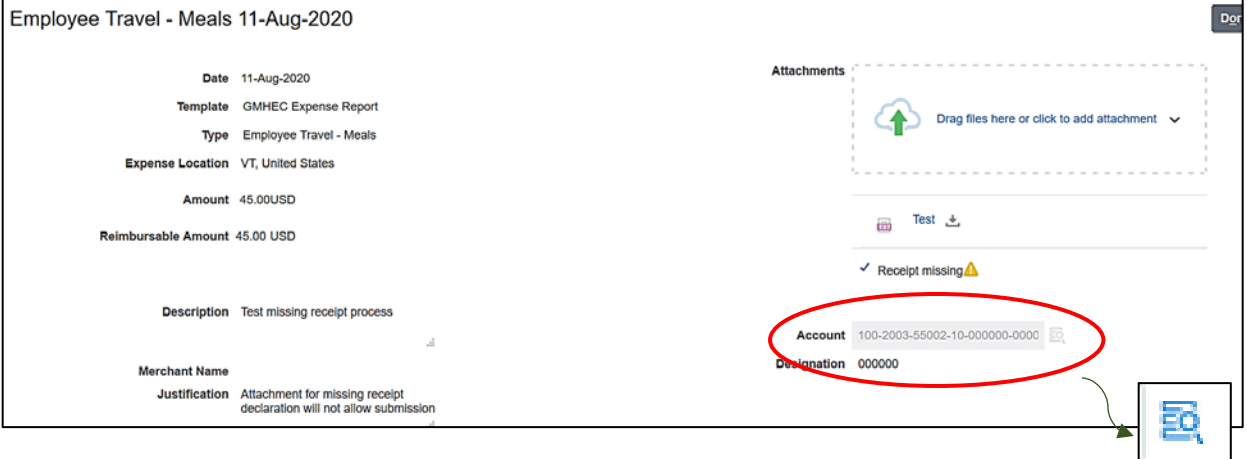| | Additional Resources: |
|---|---|
| This process is for approving Expense Reports in Oracle. | • ap@gmhec.org<br>• 802-443-2321<br>College's Travel and Expenses Policies<br>• Champlain College<br>• Middlebury College<br>• Saint Michael's College |

| Process Step & Description | Action |
|---|---|
| **Expense Report Review: Account String/ EDORDA** | Navigation Path:<br>➢ Oracle Home Page<br><br>To approve Expense Reports in Oracle go to your home page. Click on your notifications:<br><br><br><br>Click on the blue description. As shown above click on "Expense Report Approval…"<br><br><br><br>A pop-up will appear. To see the Expense item's account string (EDORDA) you will have to click View Expense Report. The Report will open where you will be able to see where the Expense is being distributed to.<br><br><br><br>Click on the Expense Report date:<br><br> |

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The Report will open, and from this screen you can see the account string/EDORDA



| Employee Travel - Meals 11-Aug-2020 | |
|---|---|
| Date  11-Aug-2020 | Attachments |
| Template  GMHEC Expense Report | Drag files here or click to add attachment |
| Type  Employee Travel - Meals | |
| Expense Location  VT, United States | |
| Amount  45.00USD | Test |
| Reimbursable Amount  45.00 USD | ✓ Receipt missing ⚠ |
| Description  Test missing receipt process | Account  100-2003-55002-10-000000-0000 |
| Merchant Name | Designation  000000 |
| Justification  Attachment for missing receipt declaration will not allow submission | |

To view the EDORDA/account distribution details, click on the three bars next to the Account box.
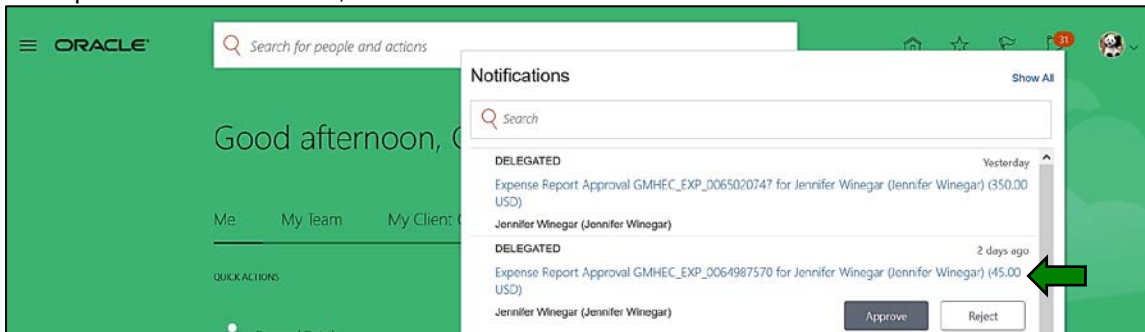
After reviewing the Report, you can click Done **Done**
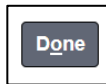
To exit the next screen, click Cancel **Cancel**

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**Expense Report Review: Request More Information**
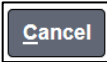
To request more information, click on the notification



Click the "Actions" button and choose "Request Information"
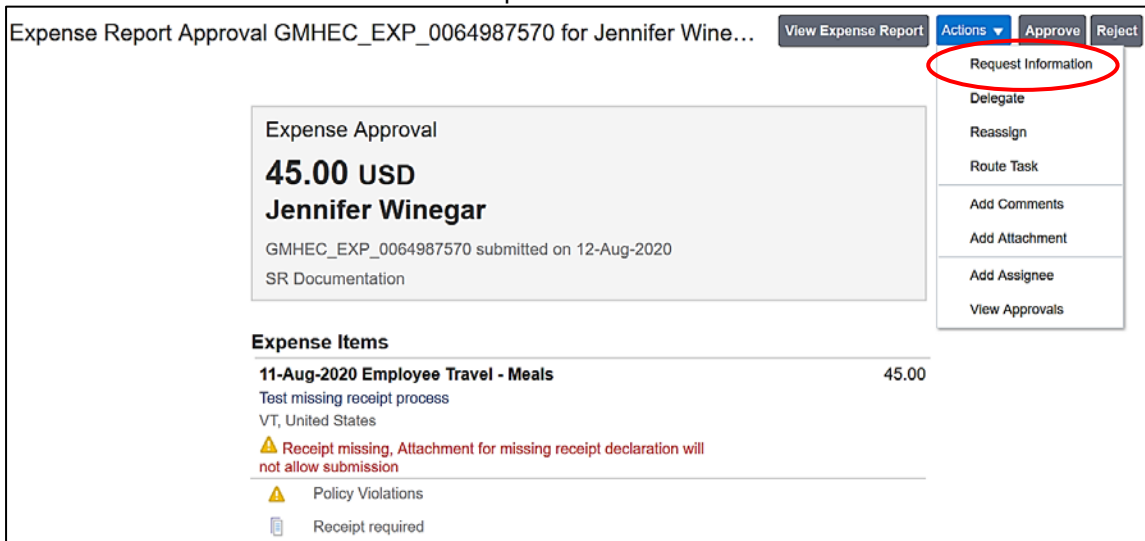


Expense Report Approval GMHEC_EXP_0064987570 for Jennifer Wine...   View Expense Report   Actions ▾   Approve   Reject

Actions menu:
- Request Information
- Delegate
- Reassign
- Route Task
- Add Comments
- Add Attachment
- Add Assignee
- View Approvals

**Expense Approval**
**45.00 USD**
**Jennifer Winegar**
GMHEC_EXP_0064987570 submitted on 12-Aug-2020
SR Documentation

**Expense Items**
11-Aug-2020 Employee Travel - Meals      45.00
Test missing receipt process
VT, United States
⚠ Receipt missing, Attachment for missing receipt declaration will not allow submission
⚠ Policy Violations
📱 Receipt required

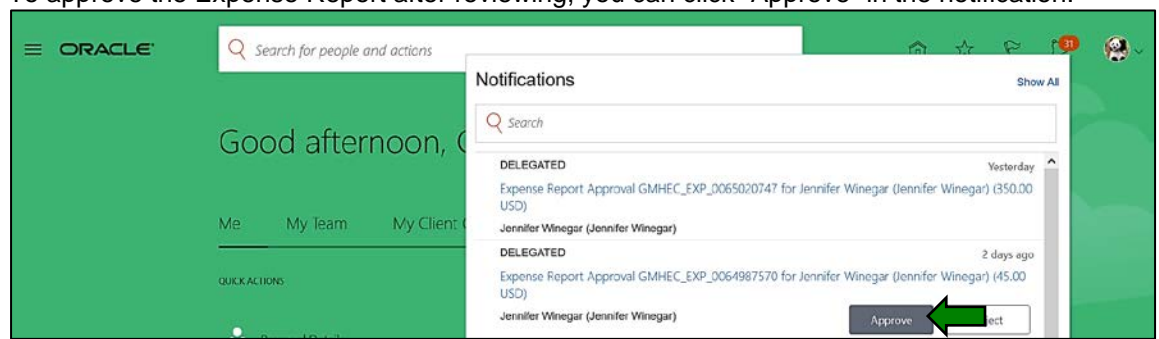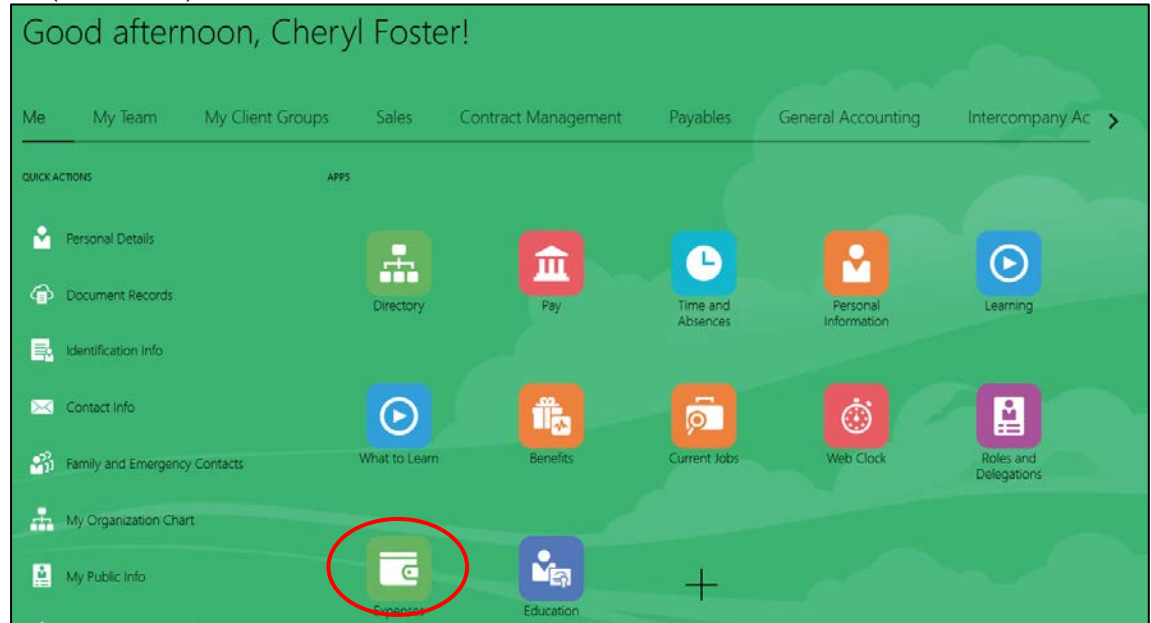| | |
|---|---|
| | **Request Information** **Submit** **Cancel** <br><br> \* Name    Jennifer Winegar <br><br> \* Comment    Please submit a receipt <br><br> Return Options  ⦿ Back to me <br>                              ◯ Follow approval flow <br><br> Receipt required | Another pop-up will appear where you will be able to enter your remarks. *Note: It is often easier to request more information instead of rejecting an Expense should you need a simple change like an accounting correction or a receipt upload.* <br><br> Enter the information you are requesting and click submit. <br><br> The end user will receive a notification for the request and will resubmit. Upon resubmittal you can then approve the Expense Report. |
| **Expense Report: Approval** | To approve the Expense Report after reviewing, you can click "Approve" in the notification: <br><br>  <br><br> Alternate Approval: You can also approve it in the Expenses module. In the "Me" tab, click on the Expenses tile (The Wallet). <br><br>  <br><br> On the home page of Expenses click on the second icon on the left-hand side. It looks like a document with a checkmark. <br><br>  |

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This will bring up all of the Expense Reports that require your attention/approval. Choose the Report you need to review/approve. Click on the Report you want to approve to highlight, then click the "Approve" button.
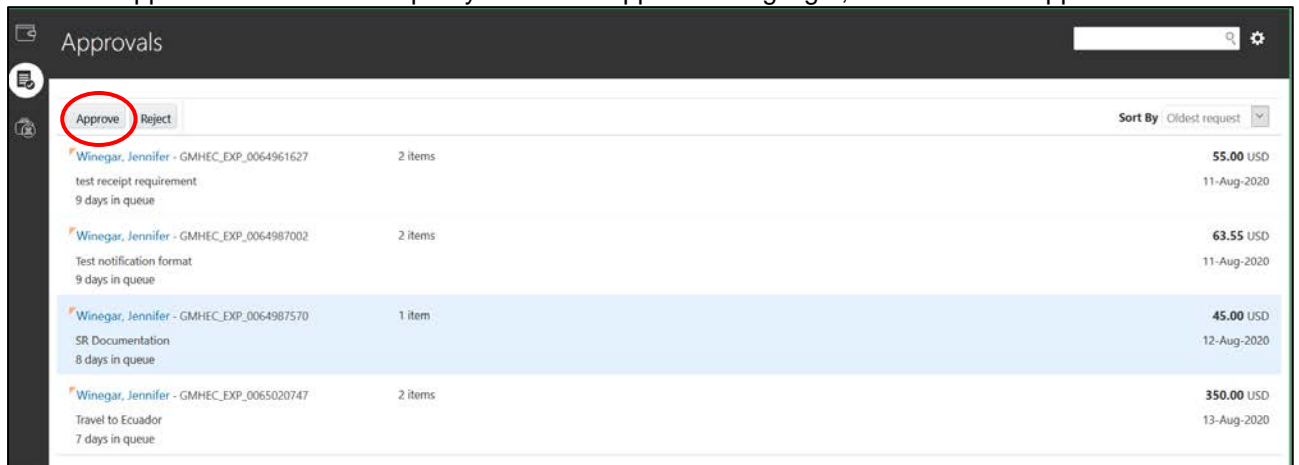


The Report will disappear from your list since it no longer requires any action.
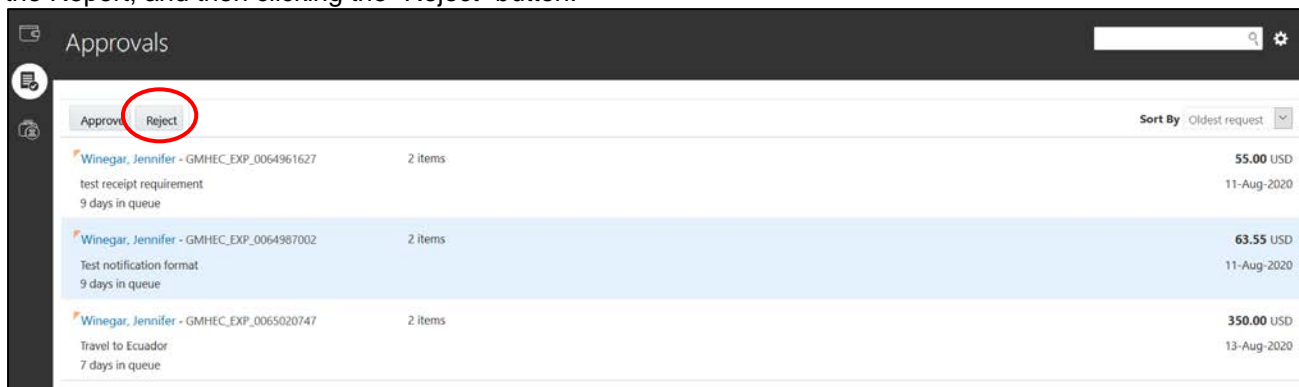
| **Expense Report: Rejection** | After reviewing an Expense Report, it is always easier to Request Information as opposed to rejecting the Report should you need a simple change like receipt upload, account string changes/description rewording.<br><br>You will only want to reject an Expense Report should it not be charged against your department's account.<br><br>To reject an Expense Report, go to your notifications and click the Reject button for the Report you want to reject. |  |
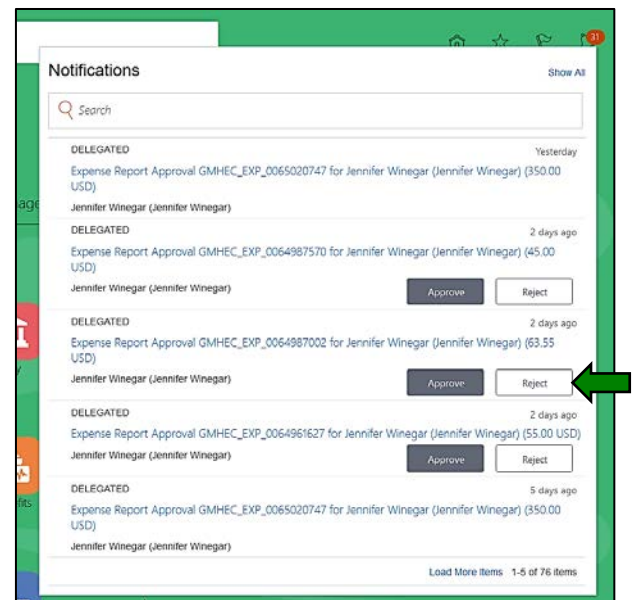
Similar to Approvals, you can also reject the Expense Report in the Expenses Module. This time highlighting the Report, and then clicking the "Reject" button.