Oracle® Cloud
Create Expense Reports

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Contents

Preface

This document describes how to install, configure, and run this recipe in Oracle Cloud Infrastructure Process Automation.

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Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at `https://www.oracle.com/corporate/accessibility/`.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit `https://support.oracle.com/portal/` or visit `Oracle Accessibility Learning and Support` if you are hearing impaired.

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Related Resources

For more information, see these Oracle resources:

- Oracle Cloud Infrastructure Process Automation documentation in the Oracle Cloud Library on the Oracle Help Center.
- Oracle Cloud at `http://cloud.oracle.com`.

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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About This Recipe

Use this recipe to create an expense report for approval through Oracle Cloud Infrastructure Process Automation.

> **Note:**
>
> The recipe is meant only for guidance and is not warranted to be error-free.

Overview

This recipe streamlines the expense report creation process by leveraging the intelligent document processing and decision service capabilities in Process Automation. To run the recipe, you must create a process application using the recipe, and configure the roles and other resources of the recipe.

Here is an overview of the process flow of the recipe.

- When a user creates an expense report by attaching one or more receipts, the process flow of the recipe is triggered. The recipe uses the OCI Document Understanding capability to automatically scan the receipts, extracts data from the receipts, and populates the required fields for each line item in the expense report.

- Once the expense report is submitted, the recipe uses a decision service activity to decide if the expense report can be automatically approved/rejected or needs manual approval. The decision service evaluates based on the total amount, cost center, expense type, and whether a receipt is attached for each line.

- For requests that need manual approval, the recipe routes it to a line manager, who reviews the expense report and take appropriate action.

- Optionally, the recipe sends the approved report to a down stream ERP system via a service task placeholder activity. For this, you'll have to configure a connector to the ERP system.

System and Access Requirements

- Oracle Cloud Infrastructure Process Automation, Version 23.12 or higher

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Perform Prerequisite Tasks

You must perform the following configuration tasks on your Oracle Identity Cloud Service (IDCS) instance in order to successfully run the recipe.

- Assign IDCS application roles
- Create the required users in IDCS

For details, see Manage Access and Assign Roles.

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Select and Configure the Recipe

On your Oracle Cloud Infrastructure Process Automation instance, create a process application using the recipe to deploy and configure the recipe's resources.

1. On the Designer home page, click **Create**. In the Create application pane, select **Create application from recipe**.

2. Find the recipe of your choice, then click **Select**.

   The Create application from recipe pane opens.

3. Review the name, version, and description for the application, and click **Create**.

The process application's main page opens, displaying all the resources of the recipe. Configure the following resources before you activate and run the application.

Configure Roles

1. Click the **Roles** tab to view the roles present in the process application. The following roles are displayed:

   • **Process User**: Users that submit an expense report.

   • **Line Manager**: Users that review and approve expense report requests.

2. Assign the right users to each role.

   a. Click a role to open the page that lists the users, groups, and permissions for the role.

   b. Delete the default users assigned, if any.

   c. In the **Search by** drop-down field, select **Users**.

   d. In the **Search for users or groups** field, search and select a user.

      The user you select is added to the role.

   e. Select the necessary permission for the user in the Application Permission Level section.

3. To return to the process application's main page, click the application's name in the breadcrumb.

Configure Connectors

Optionally, add connectors to your application to connect to third-party systems, and record the approved expense reports. To create a connection to an external ERP system, see Configure REST Connectors in Designer.

> **Note:**
>
> Without connectors, you can only test run this application in the Process Workspace.

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Activate and Run the Recipe

After you've configured the roles and other resources, you can activate and run the application.

1. On the process application's main page, click **Activate**. In the Activate pane, with the default snapshot selected, click **Activate**.

   A message confirms that the application has been activated.

2. Run the recipe.

   a. In the Activate pane, click **Test in Workspace**.

      A new browser tab opens with Workspace.

   b. Log in as a user with the Process User role, and click the activated application on the Start Requests page.

      i. In the pane that appears, complete the form and click **Submit** to start an instance of the application.

   c. Log in as a user with the Line Manager role, open the Workspace navigation menu, and click **Tasks** to open the Tasks page.

      i. Under the **My tasks** tab, click the task from the Expense Report process.

      ii. In the task details pane, review and update (if required) the form associated with the task, and then click **Approve**.

      Approving the process will complete the process flow. Rejecting it will send it back to the requestor with your comments.

3. Track the running of the process instance in the Workspace. See Track Processes.

4. View the runtime execution details of your process in **Analytics**. See Use Analytics.

Optionally, see the decision rules and the auto-approve/reject and manual approval behavior that they drive. If required, update the process and decision service rules based on your needs.

Related Documentation

- *Using Oracle Cloud Infrastructure Process Automation*
- Oracle Cloud Infrastructure Document Understanding