Odyssey Use Case
Expense Management

Pantheon's Odyssey Digital Automation Platform tackles the problems of integration, scheduling, routing, approvals, reporting and auditing. Odyssey brings together your existing applications, operating systems, databases in new and exciting ways, and it makes complex interactions faster and more consistent.

This document contains a real-world Use Case of how our customers have used Odyssey to extend their capabilities, bring speed and precision to their work, and allow employees to get more done in less time.

Expense Management

A customer wanted a way to manage their employee-incurred expenses. A workflow was constructed to request approval for expenditures, manage the approvals, and follow-up where necessary before submitting the expenses to Accounts Payable.

For travel expenses, no prior authorization was required. The Employee submitted electronic receipts (attached documents or scans of paper receipts), entered date and cost information, and submitted the reimbursement request form. The system would require the Employee fill out all mandatory fields before accepting the submission. The system then sends to the contact email of the Manager a link and instructions for the process. The Manager reviewed the documentation and then approved the request or rejected the request. If rejected, the Employee could modify the request (such as providing additional documentation) and resubmit the request. If approved, the system forwarded the information to Accounts Payable.

For non-travel expenses, the process was more involved. The Employee submitted a request form including a description of what was needed, justification for the expenditure, three vendor quotes with indication of preferred vendor, and a decision requested by date. The Employee could attach supporting documentation if required. If the cost was below an amount determined by the Employee's user group (e.g., middle management), the request was automatically approved.

If the request required approval, the system then sends to the contact email of the Manager a link and instructions for the process. The Manager reviewed the documentation and then approved the request or rejected the request. If rejected, the Employee could modify the request (such as providing additional documentation) and resubmit the request. If the Manager took no action and the requested by date drew closer, both the Manager and the Employee would receive alerts via email that action was required. If the Manager approved the request, the Manager could set an expiration date by which the funds could be used.

Later, after the expense was incurred, the Employee submitted electronic receipts (attached documents or scans of paper receipts), entered date and cost information, and submitted the reimbursement request form.