With the implementation of Oracle Cloud, Expense Reports will be prepared and submitted through Oracle rather than Concur Expense with reimbursements flowing through the same bank account as your payroll direct deposit. The information on the page below provides guidance on creating and submitting an Expense Report within Oracle Cloud Expense.

1. Upon logging into Oracle, click the Navigator icon and select the Expenses module from the list.

2. To create a new expense report, click Actions and select Create Expense Report.

3. Complete the Report Header by entering the Purpose of the expense report.

4. Click the plus sign (+) to create a new expense item and add it to the report. (Please see reverse for instructions.)

5. If applicable, click Add Existing to import One Card charges or other expenses from your list of Expense Items. (This button will be grayed out as shown if you do not have any existing expense items.)

6. Click the check box to acknowledge you have read and accept the Travel and Business Expense Policy.

7. Click Submit. Your report will then route to the applicable Financial Unit Manager(s) for approval. You can alternatively Save and Close the report to complete and submit later.

On the main Expenses page, you can view your individual Expense Items or Expense Reports by clicking on the respective tile. One Card charges and other individual expense items that have not been placed into a report will be displayed in the section below.

Note: upon logging in for the first time, you may see the Product Tour screen. Click Go to Travel and Expenses to continue to the module. You can also create an expense report directly from this screen.
With the implementation of Oracle Cloud, Expense Reports will be prepared and submitted through Oracle rather than Concur Expense with reimbursements flowing through the same bank account as your payroll direct deposit. The information on the page below provides guidance on creating and itemizing an Expense Item within Oracle Cloud Expense.

The Create Expense Item window will open upon selecting to add (+) an expense or create an expense item in an Expense Report (Please see instructions on reverse).

You must complete all required fields denoted with an asterisk (*).

1. Enter the Date on the receipt or credit card charge.
2. Select the VU General Expenses template for all expenses other than relocation.
3. Select the expense Type from the drop-down menu. All available expense types are listed in alphabetical order.
4. Enter the total Amount of the expense. You should not change the Number of Days. Click the Itemize button to itemize or allocate the expense. (Please see Itemizing Expenses below for additional information.)
5. Complete any other required fields (e.g., Merchant Name).
6. Click Save and Close to save this expense and return to the report view page (see reverse).

Vanderbilt policy requires a receipt for all expenses $75 or more. Click the plus sign (+) to attach your receipt(s) and any other supporting documentation.

Note: Check the Receipt missing box if you do not have a receipt for an expense of $75 or more.

A default expense account (i.e., COA string) will be populated for you based on your Work Unit and the selected expense Type. Review the Account and make updates as needed. If you are charging a Project (e.g., Grant, Faculty Fund), please enter the POET string here.

A reference guide for the new Chart of Accounts is available on the SkyVU website at https://www.vanderbilt.edu/skyvu/training-resources.php.

Updated 01/24/2018

(Please see reverse for Creating and Submitting an Expense Report.)