The information on the page below provides guidance on creating and submitting an Expense Report within Oracle Cloud Expenses.

1. To access expenses from your Oracle home page click on Expenses (in the Me section).

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

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

4. Click Create Item to create a new expense item and add it to the report. (see reverse for detailed 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. To submit your report:
   - Click the check box to acknowledge you have read and accept the Travel and Business Expense Policy.
   - 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.

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.

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(Please see reverse for Creating and Itemizing an Expense.)
You must complete all required fields denoted with an asterisk (*).

1. Enter the Date on the receipt or credit card charge.
2. Select the expense Type from the drop-down menu. All available expense types are listed in alphabetical order.
3. Enter the total Amount of the expense. You should not change the Number of Days.
   Complete any other required fields (e.g., Merchant Name).

Vanderbilt policy requires a receipt for all expenses $75 or more. Drag files to the attachment section or click to add them. Note: Check the Receipt missing box if you do not have a receipt for an expense of $75 or more.

The Create Expense Item window will open upon selecting the (+) Create item button.

Itemizations

You must complete this section when:
- The Travel and Expense Policy requires that expense type to be itemized (for example: alcoholic beverages);
- A portion of an expense is personal; or
- The expense needs to be distributed among multiple COA or Project strings.

Note that this section is required only when one or more of these conditions apply.

To add an itemization:
- Click the plus sign (+) and select the Type from the drop-down menu. Then enter the date and amount for the item.
- Adjust the Account or Project fields or mark the item as personal (as applicable).
- Repeat this process to add items until you have itemized the entire expense.

The Account will be populated with a default Chart of Accounts (COA) string based on your HR record and the selected expense Type.
- If you are charging your expense a Project (e.g., Grant, Faculty Fund), please enter the Project, Task and Organization, ensuring that the Financial Unit in the COA is populated to ensure proper approval flow.
- A COA reference guide is available in the Help Center widget at the bottom of the page.