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.

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. (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. 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.

On the main Expenses page, you can view your individual Expense Items or Expense Reports by clicking on the respective title. One Card charges and other individual expense items that have not been placed into a report will be displayed under Expense Items.
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**
   - Complete any other required fields (e.g., Merchant Name).

**Itemizations**

- At the bottom of the page you can itemize your expenses for items such as hotel accommodations, alcohol or personal expenses. This function is also used to allocate the funding among multiple COA or Project strings.
- 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 as applicable.
- Use the **Account** or **Project** fields to adjust the charge account if needed, or if an item is a personal expense, click the check box.
- Repeat this process to add items until you have itemized the entire expense and the remaining balance is zero.

**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 **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 **Chart of Accounts** reference guide is available on the SkyVU website at [https://www.vanderbilt.edu/skyvu](https://www.vanderbilt.edu/skyvu)