THE UNIVERSITY OF MEMPHIS

Create an Expense Report

November 2025

Overview

Introduction: The QRG provides step-by-step instructions to help employees create and submit an expense report with a new expense item.

Audience: All Employees

How To – Summary

Step 1: Sign in to Oracle Cloud.

Step 2: Navigate to the Expenses work area.

Step 3: Start with creating an expense report.

Step 4: Enter the mandatory expense report details.

Step 5: Create a new expense item to add to the report.

Step 6: Search and select a pre-approved authorization.

Step 7: Enter the POET details (if the expense is related to a project) and Save it.

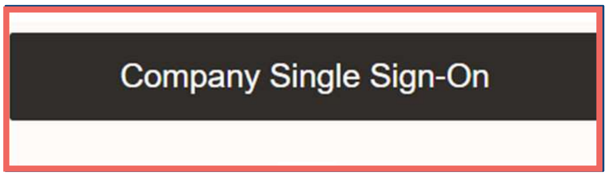
Step 8: Attach an expense receipt to the expense item in the report.

Step 9: Search and select a receipt file to upload.

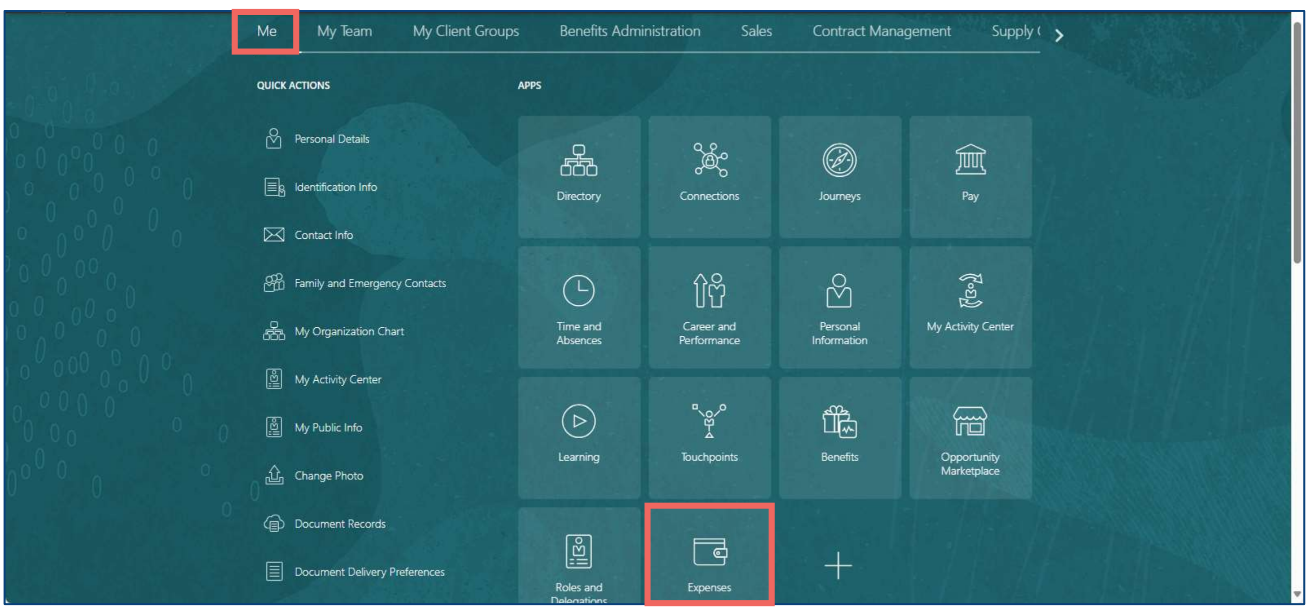
Step 10: Check in the declaration and Submit the report for approval.

Initial Navigation

Step 1: Sign in using Single Sign-On (SSO): Click **Company Single Sign-On**, enter your **UUID** and **Password**, then click **Login**.

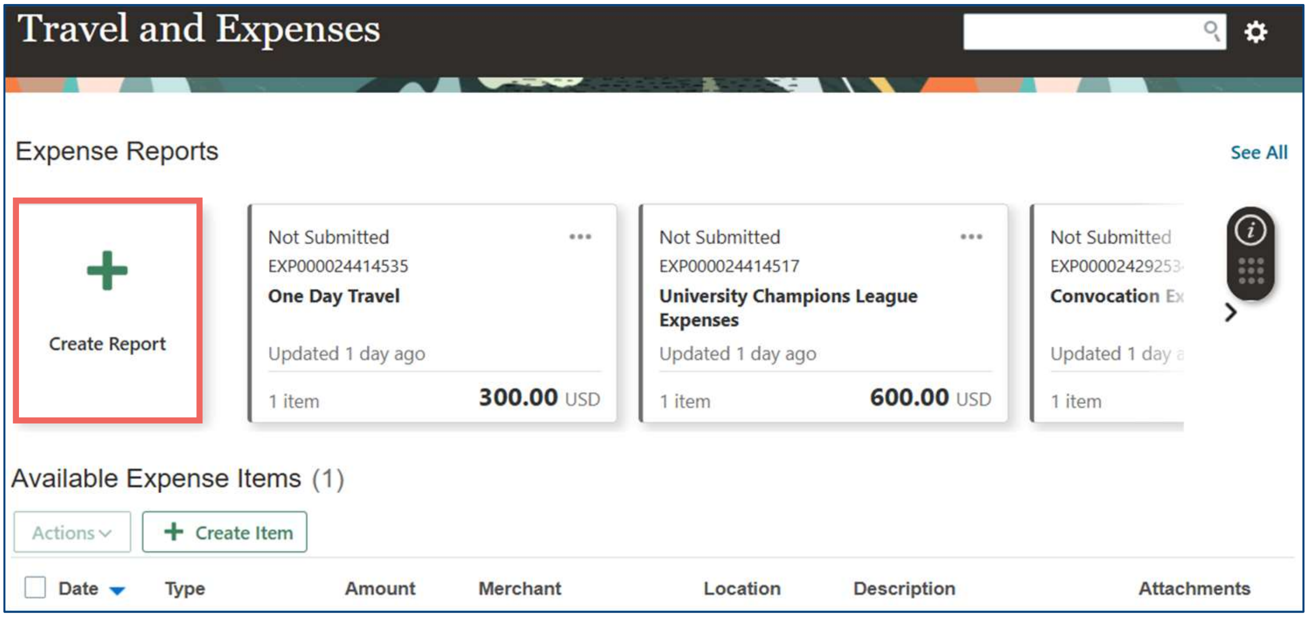


Step 2: On the Oracle **home page**, toggle to **Me** tab and click **Expenses**.



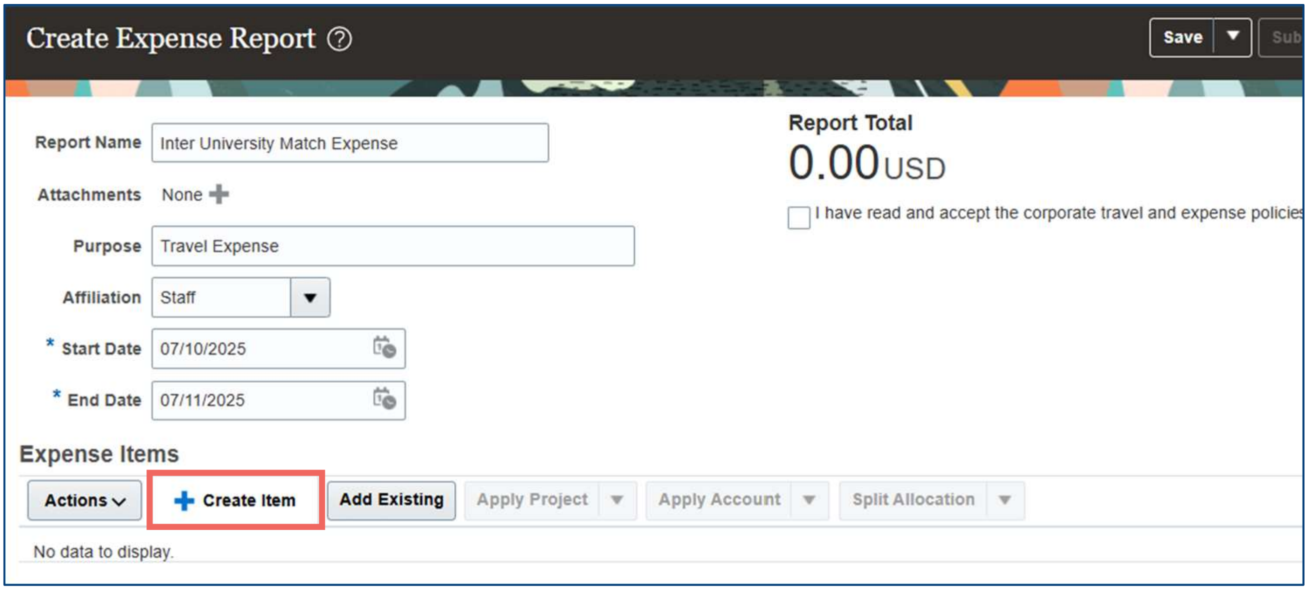
Create Expense Report

Step 3: Under the **Travel and Expenses** screen, click the **Create Report** card.



Step 4: Enter the necessary details on the **Create Expense Report** screen. Then click **Create Item** to create a new expense item.

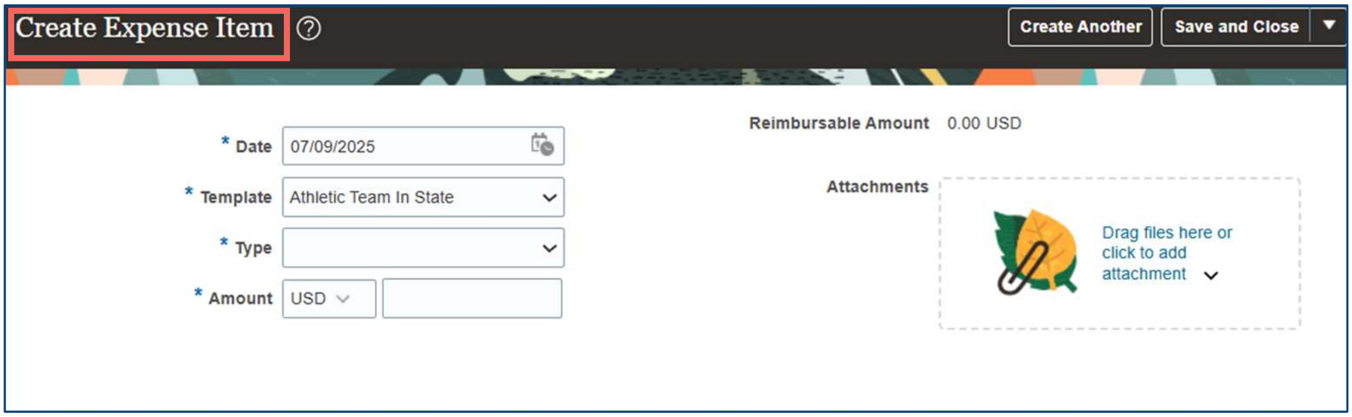
Click **Add Existing** to add an existing expense item to the report.



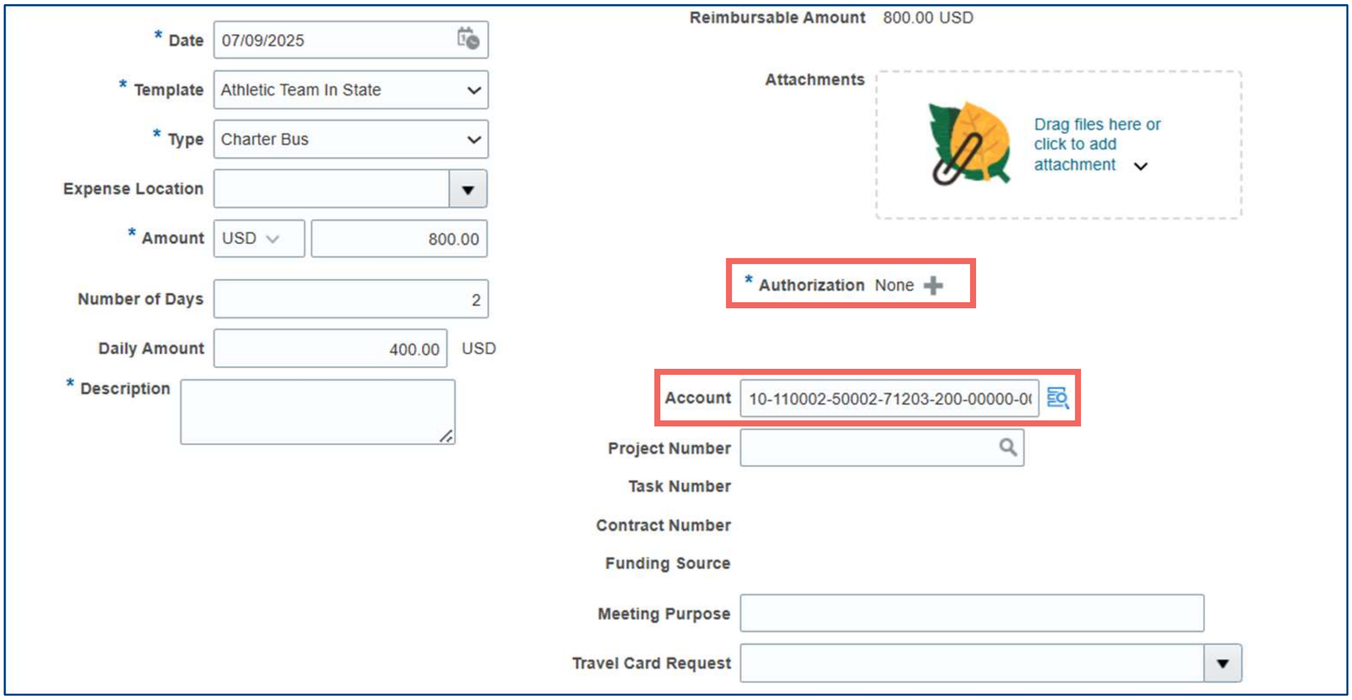
Create Expense Item

Step 5: Enter the expense item details on the **Create Expense Item** screen.

Selecting the **Type** will cause additional fields to populate on the screen.

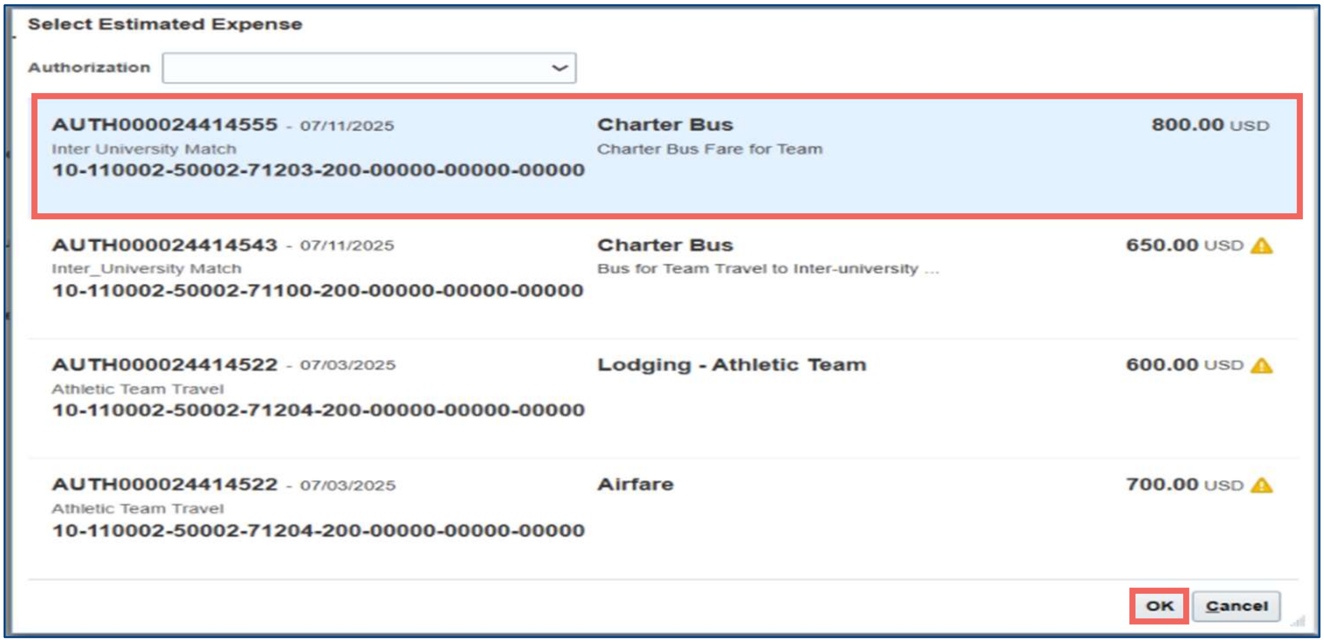


Step 6: Fill in the mandatory fields marked with an asterisk (*), and validate the **Account** displayed. Then click the **Plus (+)** icon to add a valid **Authorization**.



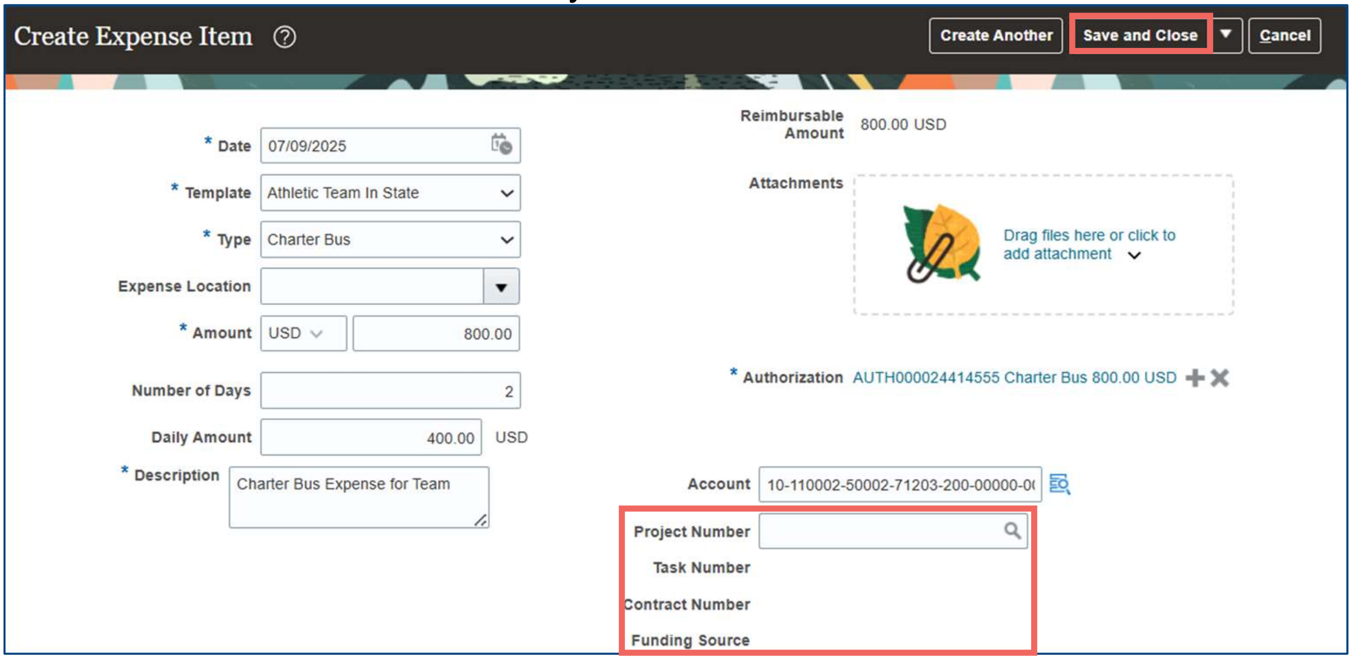
Add Authorization

Step 7: From the list of approved authorizations, select the applicable estimated expense. Then, click **OK**.



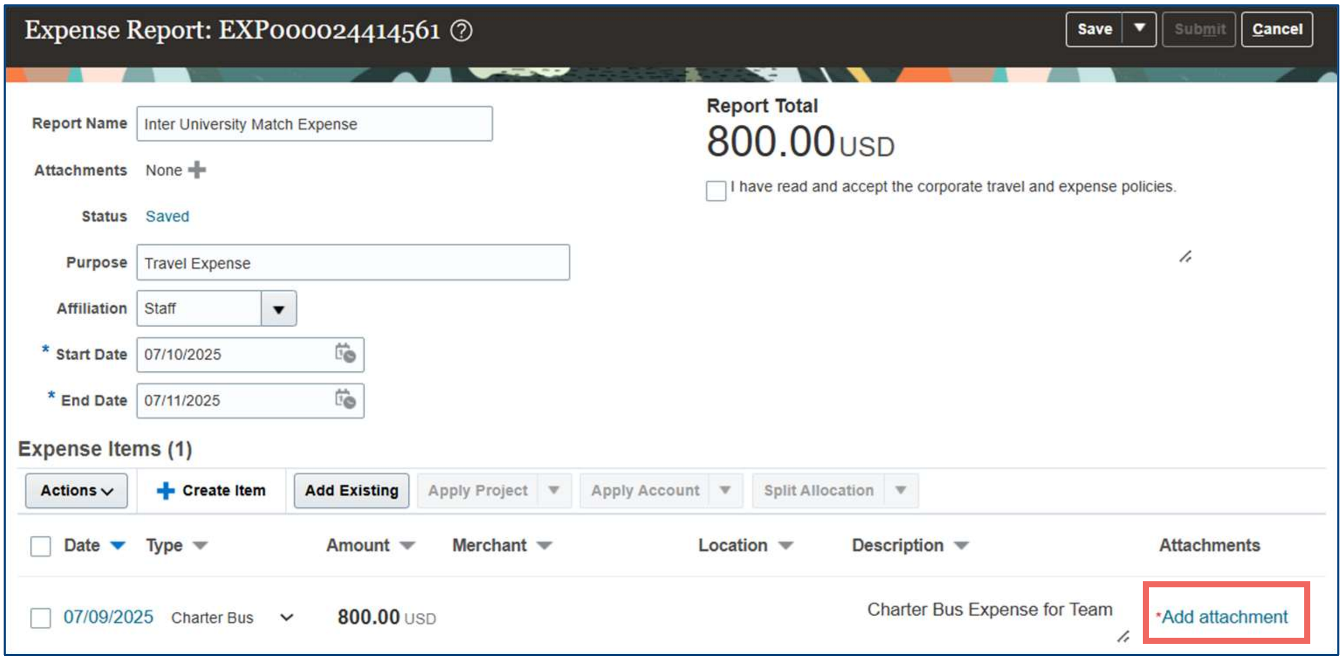
Step 8: After selecting the authorization, click **Save and Close**.

ⓘ For project related expenses, search and select the Project Number. The POET details will be automatically added.

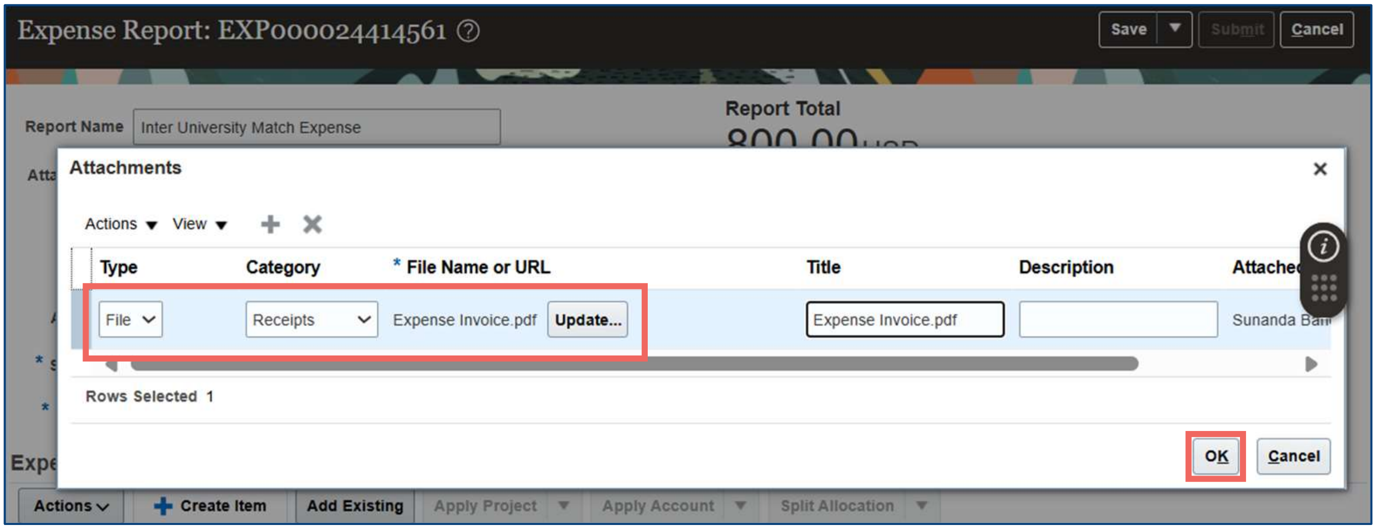


Add Attachment

Step 9: The new expense item is added to the report, updating the Report Total. Click Add Attachment to add expense receipts.



Step 10: In the **Attachments** window, select and upload the receipts file and click **OK**.



Submit Expense Report

Step 11: Select the disclaimer **Checkbox** and then click **Submit** to complete the expense report creation.