



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.

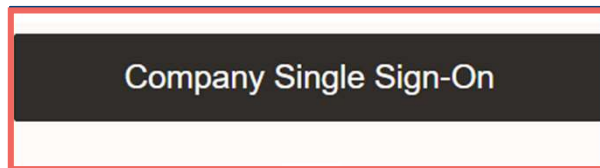
Step 8: Attach an expense receipt to the expense item in the report.

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

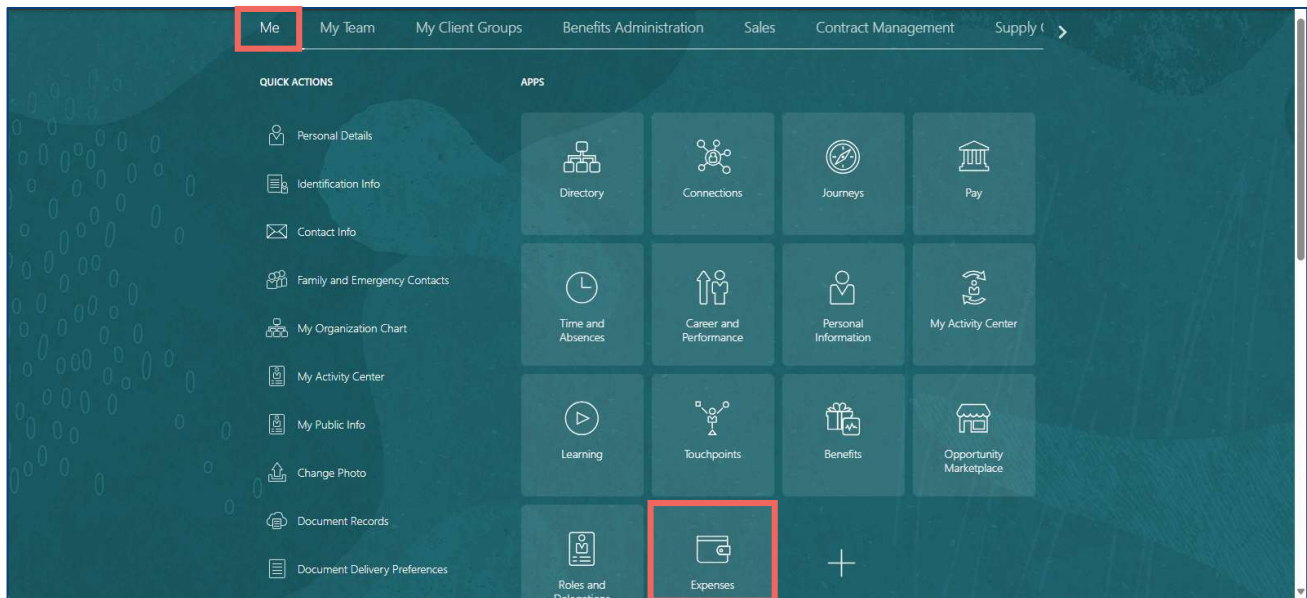
Step 10: Check in the declaration and Submit the report for approval.

Initial Navigation

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

A login form titled "Login to Oracle Cloud". It contains two input fields: "UUID" with a placeholder "e.g., jsmith" and "Password". Below the fields is a blue "Login" button.

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.

The screenshot shows the 'Travel and Expenses' interface. At the top, there's a header with a search bar and a settings icon. Below the header, the 'Expense Reports' section is visible. It contains three cards, each representing a report. The first card, 'One Day Travel', is highlighted with a red box and has a green plus icon and the text 'Create Report'. The other two cards are 'University Champions League Expenses' and 'Convocation Expenses'. Each card shows the report status as 'Not Submitted', a unique ID, the title, the update time ('Updated 1 day ago'), and the total amount ('1 item 300.00 USD', '1 item 600.00 USD', and '1 item' respectively). To the right of the cards is a 'See All' link and an information icon. Below the cards, the 'Available Expense Items (1)' section is shown, with a table header including 'Date', 'Type', 'Amount', 'Merchant', 'Location', 'Description', and 'Attachments'. There are also buttons for 'Actions' and '+ Create Item'.

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.

The screenshot shows the 'Create Expense Report' form. At the top, there's a header with a question mark icon, a 'Save' button, and a 'Submit' button. The form is divided into several sections. The 'Report Name' field contains 'Inter University Match Expense'. The 'Report Total' is displayed as '0.00 USD'. The 'Attachments' section shows 'None' with a plus icon. The 'Purpose' field contains 'Travel Expense'. The 'Affiliation' dropdown is set to 'Staff'. The 'Start Date' is '07/10/2025' and the 'End Date' is '07/11/2025'. There is a checkbox for 'I have read and accept the corporate travel and expense policies'. The 'Expense Items' section at the bottom has a table with a header row containing 'Actions', '+ Create Item' (highlighted with a red box), 'Add Existing', 'Apply Project', 'Apply Account', and 'Split Allocation'. The table body shows 'No data to display.'

Create Expense Item

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

i 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**.

Select Estimated Expense

Authorization

AUTH000024414555 - 07/11/2025

Inter University Match

10-110002-50002-71203-200-00000-00000-00000

Charter Bus

Charter Bus Fare for Team

800.00 USD

AUTH000024414543 - 07/11/2025

Inter_University Match

10-110002-50002-71100-200-00000-00000-00000

Charter Bus

Bus for Team Travel to Inter-university ...

650.00 USD

AUTH000024414522 - 07/03/2025

Athletic Team Travel

10-110002-50002-71204-200-00000-00000-00000

Lodging - Athletic Team

600.00 USD

AUTH000024414522 - 07/03/2025

Athletic Team Travel

10-110002-50002-71204-200-00000-00000-00000

Airfare

700.00 USD

OK

Cancel

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

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

Create Expense Item

Create Another

Save and Close

Cancel

* Date

07/09/2025

* Template

Athletic Team In State

* Type

Charter Bus

Expense Location

* Amount

USD

800.00

Number of Days

2

Daily Amount

400.00

USD

* Description

Charter Bus Expense for Team

Reimbursable Amount

800.00 USD

Attachments

Drag files here or click to add attachment

* Authorization

AUTH000024414555 Charter Bus 800.00 USD

Account

10-110002-50002-71203-200-00000-00000-00000

Project Number

Task Number

Contract Number

Funding Source

 THE UNIVERSITY OF
MEMPHIS

UofM | 6

Add Attachment

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

Expense Report: EXP000024414561

Save

Submit

Cancel

Report Name

Inter University Match Expense

Report Total

800.00USD

Attachments

None

☐ I have read and accept the corporate travel and expense policies.

Status

Saved

Purpose

Travel Expense

Affiliation

Staff

* Start Date

07/10/2025

* End Date

07/11/2025

Expense Items (1)

Actions

+ Create Item

Add Existing

Apply Project

Apply Account

Split Allocation

☐	Date	Type	Amount	Merchant	Location	Description	Attachments
☐	07/09/2025	Charter Bus	800.00 USD			Charter Bus Expense for Team	Add attachment

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

Expense Report: EXP000024414561

Save

Submit

Cancel

Report Name

Inter University Match Expense

Report Total

800.00USD

Attachments

None

☐ I have read and accept the corporate travel and expense policies.

Status

Saved

Purpose

Travel Expense

Affiliation

Staff

* Start Date

07/10/2025

* End Date

07/11/2025

Expense Items (1)

Actions

+ Create Item

Add Existing

Apply Project

Apply Account

Split Allocation

☐	Date	Type	Amount	Merchant	Location	Description	Attachments
☐	07/09/2025	Charter Bus	800.00 USD			Charter Bus Expense for Team	Add attachment

Attachments

Actions

View

+

×

Type	Category	* File Name or URL	Title	Description	Attached
File	Receipts	Expense Invoice.pdf Update...	Expense Invoice.pdf		Sunanda Ban

Rows Selected 1

OK

Cancel

Submit Expense Report

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

Expense Report: EXP000024414561 ?

Save

Submit

Cancel

Report Name

Inter University Match Expense

Attachments

None +

Status

Saved

Purpose

Travel Expense

Affiliation

Staff

* Start Date

07/10/2025

* End Date

07/11/2025

Report Total

800.00 USD

☒

have read and accept the corporate travel and expense policies.

Expense Items (1)

Actions

+ Create Item

Add Existing

Apply Project

Apply Account

Split Allocation

☐	Date	Type	Amount	Merchant	Location	Description	Attachments
☐	07/09/2025	Charter Bus	800.00 USD			Charter Bus Expense for Team	(1)