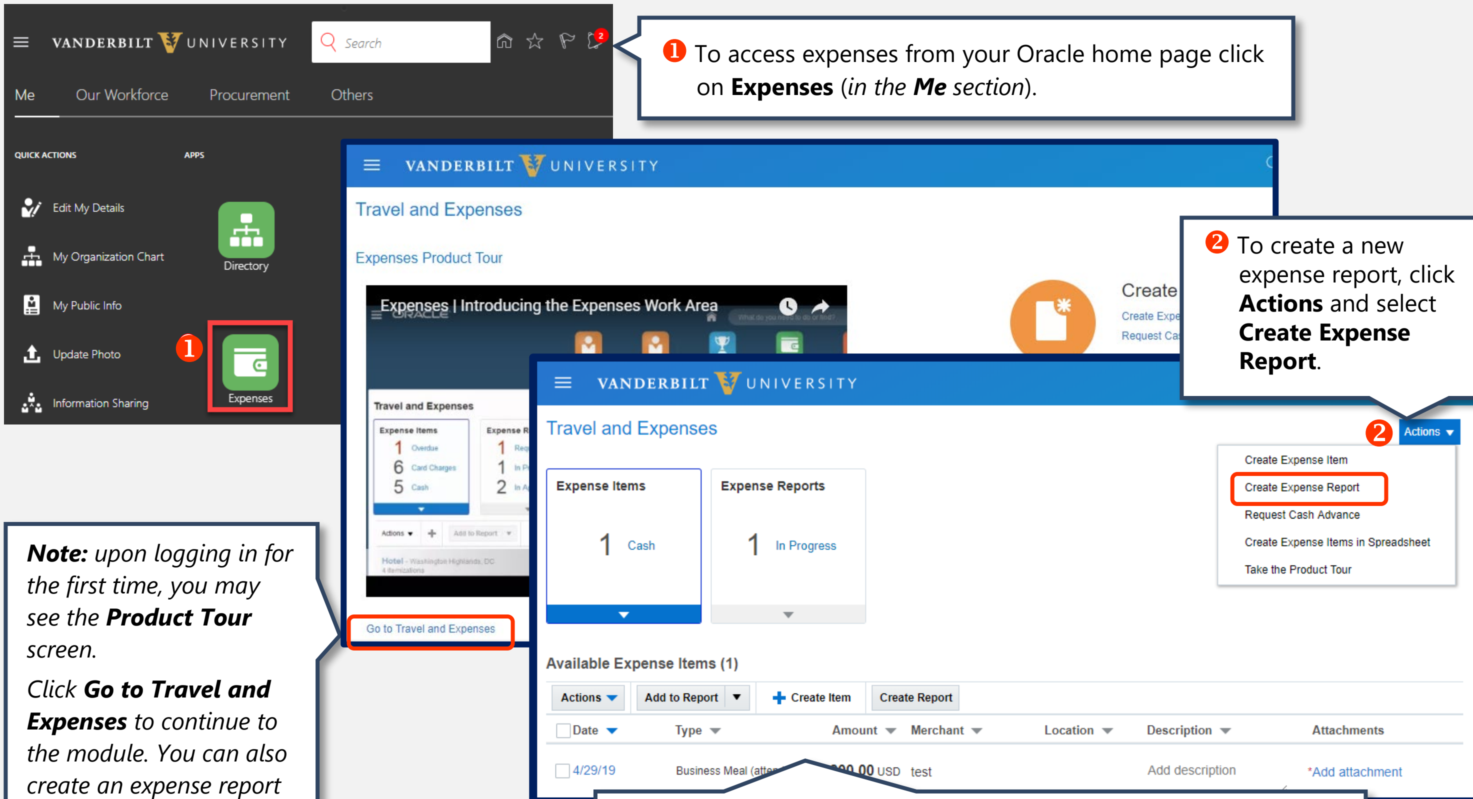
You must attach a receipt of payment!

SkyVU Quick Reference Guide: Creating and Submitting an Expense Report

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



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

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

***Note:** upon logging in for the first time, you may see the **Product Tour** screen.*

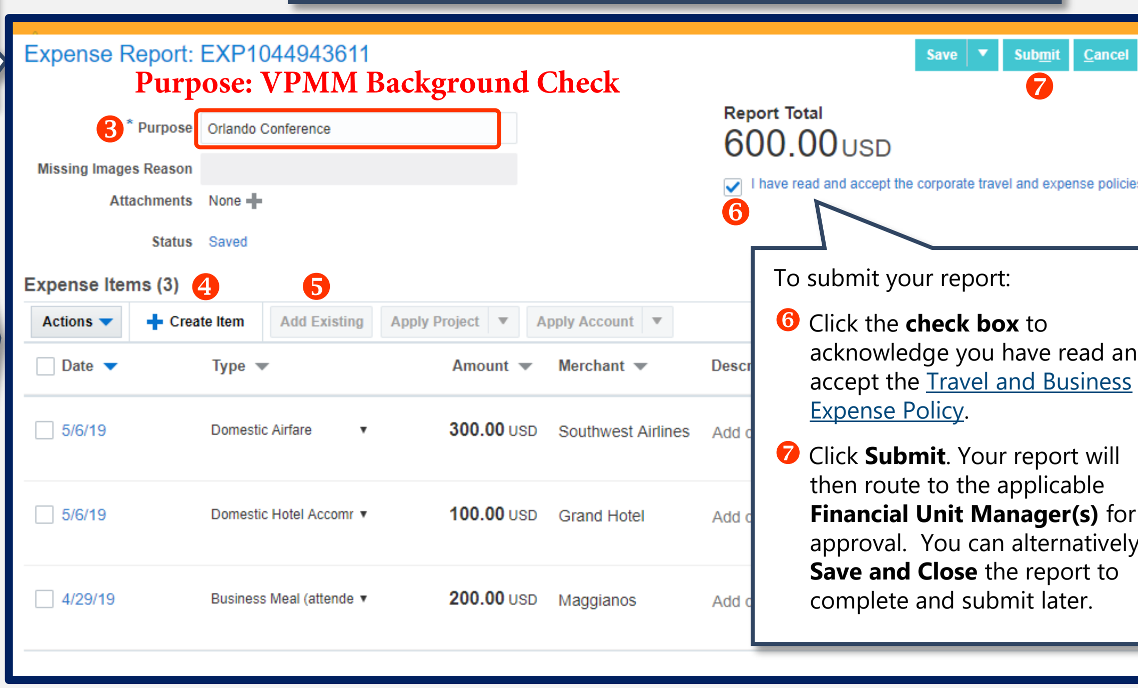
*Click **Go to Travel and Expenses** to continue to the module. You can also create an expense report directly from this screen.*

*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**.*

❸ Complete the **Report Header** by entering the **Purpose** of the expense report.

Purpose: VPMM Background Check



❹ Click **Create Item** to create a new expense item and add it to the report. *(**Please see reverse for instructions.**)*

❺ 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.)*

To submit your report:

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

❼ 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.

Updated 07/25/2019

(Please see reverse for Creating and Itemizing an Expense Item.)

SkyVU

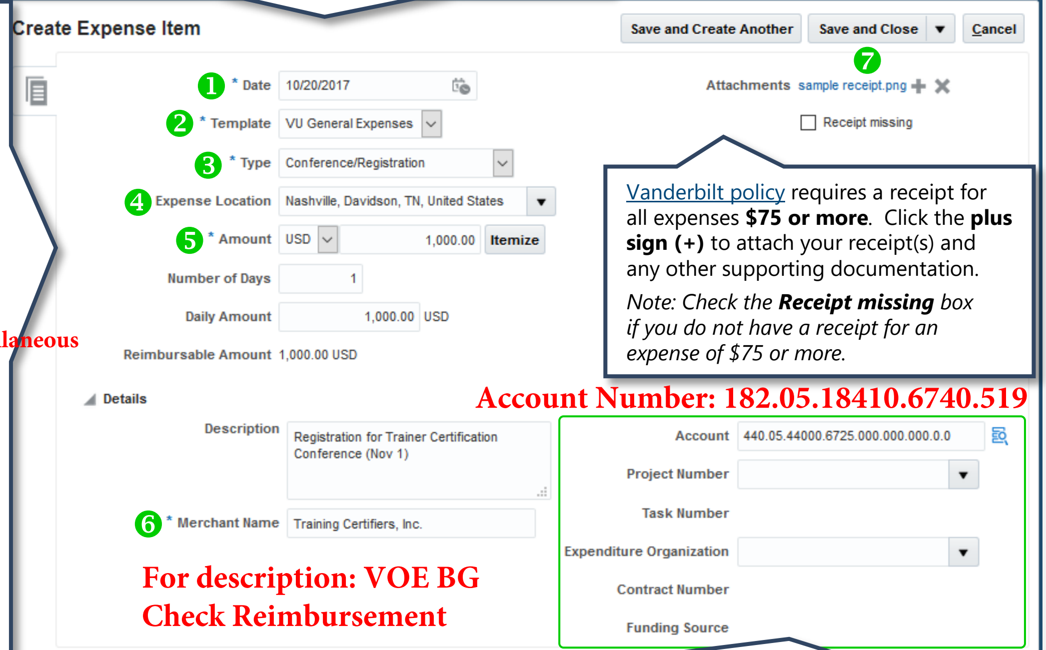
Quick Reference Guide: Creating and Itemizing an Expense Item

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. **Choose: Miscellaneous**
4. Enter the **Expense Location**. For US locations enter correct city, county, zip code combination. For non-US locations select the country.
5. 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.)*
6. Complete any other required fields (e.g., **Merchant Name**).
7. 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.*

Account Number: 182.05.18410.6740.519

For description: VOE BG Check Reimbursement

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/Oracle-Cloud-Chart-of-Accounts-Quick-Reference-Guide.pdf.*

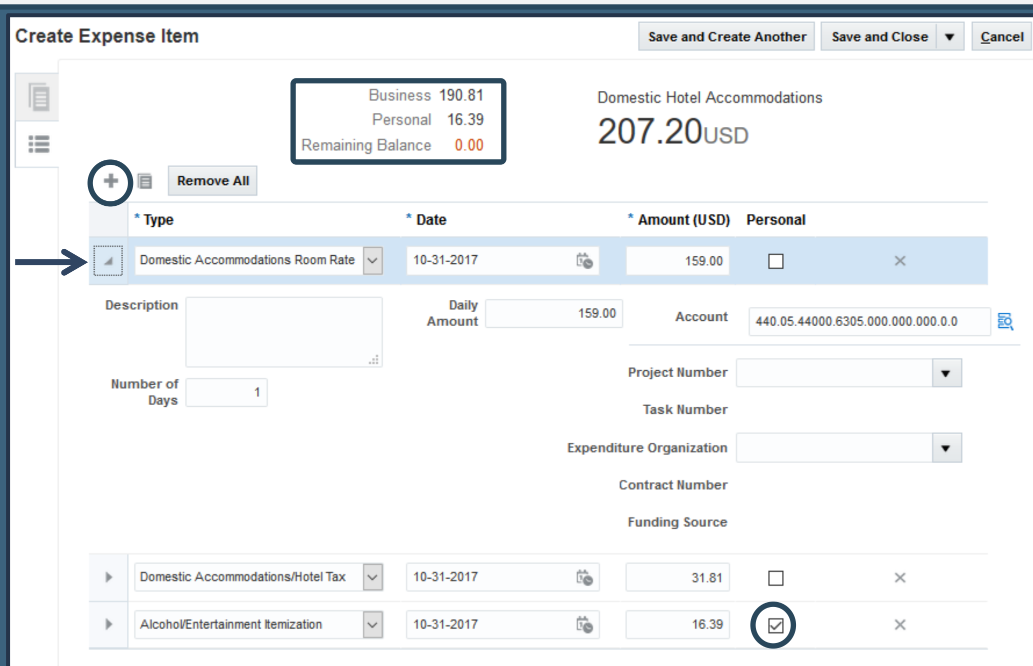
Itemizing Expenses

Selecting the **Itemize** button will open a second tab for your expense item so that 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.



Updated 07/25/2019

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