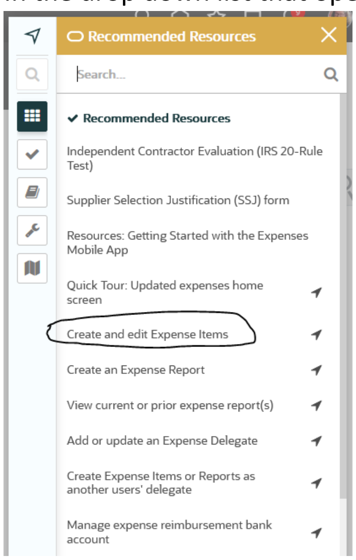
How Tos – Travel-Expense Items and Reports

Receipts:

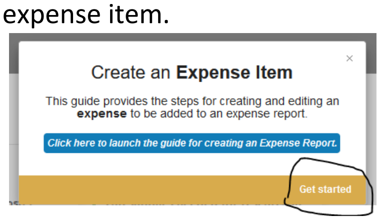
- Take a picture of the receipt using your phone.
    - Send the email to yourself using your VU email.
- Or scan the receipt using one of the printer/scanner/copier on campus. This will be sent to you through your VU email.
- Download the receipt to your download folder on your computer.
- Upload the receipt from your computer into the “Expense” area under the ‘Me’

Creating Expense Items:

- In Oracle under the “Me” tab click on the ‘Expense’ icon. This will open the Travel and Expenses section.
- Click on the “Help Center” icon. This looks like a phone. 
- In the drop down list that opens click on “Create and edit Expense Items” in the list.



- A pop up labeled “Create an Expense Item” is opened. This will guide you through creating an expense item.

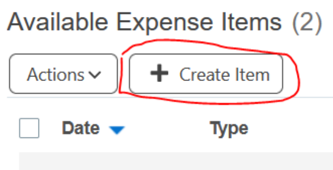


- Click on the lower right-hand corner of the pop up where it says, “Get started.”
- Follow the instructions.

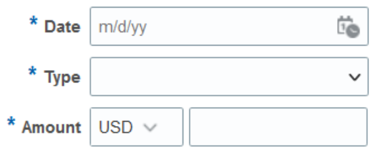
OR

Revised August 12, 2022

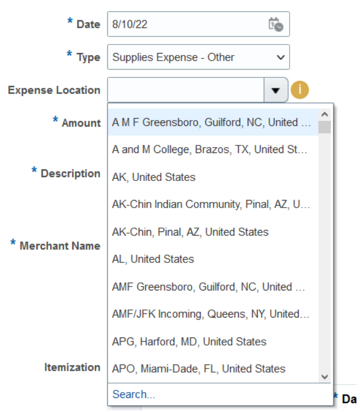
- You can click on create expense item on the left-hand side of your screen.



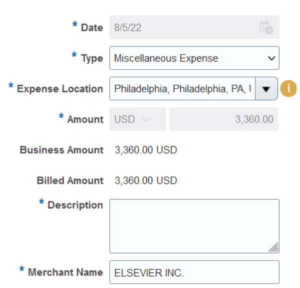
- The next screen you will enter the date on the receipt, select the expense type from the dropdown, and add the amount to be expensed.



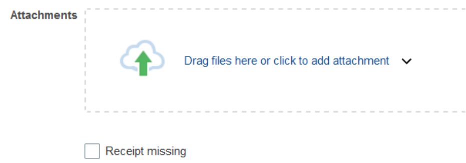
- Next a larger area opens up after the amount is keyed. Here you will need to select the following.
    - Expense location – You can start typing in the city and select from options the system provides or you can use the dropdown menu and search for location.



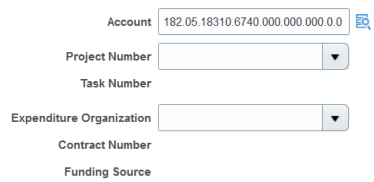
    - You will complete the description, merchant name.



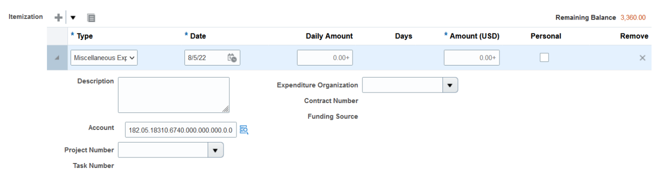
    - Next you will need to either drag and drop or click to add your receipts and other documentation under attachments. Receipts are not required for items less than $75.00 per policy. However, it is best practice to add the receipts, especially if you are charging a federal project. When you do not attach the receipt, you must check the box beside “Receipt missing.”



- Now you will need to enter the project number, task number, and expenditure organization.

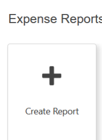


- If splitting between funding sources or travel expenses are being processed, you would use the itemization section. The same information is needed in the itemization section as in the section above.



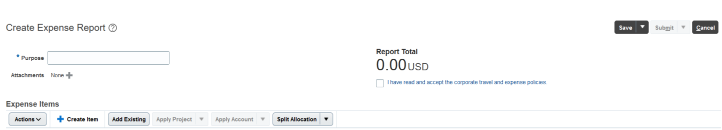
Creating an Expense Report:

- How to create a blank expense report?
  - From the Travel and Expenses screen, you can click on the icon "Create Report." This is located on the left-hand side of your screen.

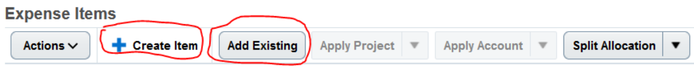


- The next screen will be blank. On this screen you will need to type in the purpose of the expense report. Examples:
  - Publication cost for grant research findings.
  - Professional development to learn xyz process.

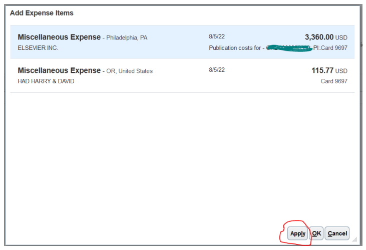
  NOTE: Do not use for reimbursement of abc expense. It's already known this is a reimbursement if it's not on a one card.



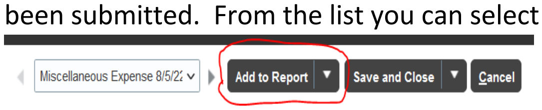
From here you can create new items, add existing items, or edit items already on the report.



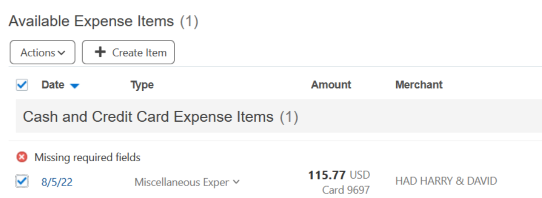
- How to add an expense item to an expense report?
  - If you are already on the expense report, you can click on "Add Existing" and it will give you a pop-up of expense you have already created. Highlight the item(s) you want to add and click on the 'Apply' button in the bottom right-hand corner of the pop-up.



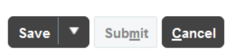
  - While you have the expense item open you can click the drop-down button "Add to Report." This will give you a list of any expense reports you have created but have not been submitted. From the list you can select the report and the item will be added.



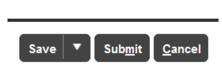
  - If the expense item(s) is a one card charge, it will be prepopulated in the "Available Expense Items" section. You can click the box beside the item, and this will add a check mark.



  - From here you click the "Actions" dropdown and click 'Add to Report.' This will give you a list of reports you already have created, but not submitted. Click on the report you want to add it to.
- How to submit your expense report.
  - Make sure the purpose is completed.
  - Add any additional attachments you might need. It's preferred to have the attachments at this header level.
  - Check the check box beside the statement "I have read and accept the corporate travel and expense policies."

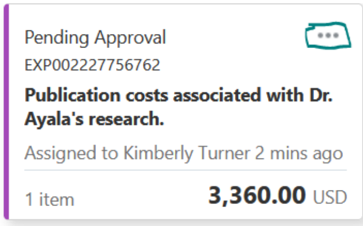


  - Click the "Save" button.

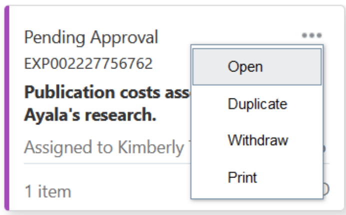


  - Click the "Submit" button.

- To edit an expense report regardless of reason (ie, rejected, not submitted).
    - Click on the three "…" icon in the top right-hand corner of the report item.



    - Click on "Open."



- Follow the steps above to complete any edits, save, and submit.