



Contact: rftravel@rfsuny.org

Use this job aid to complete Step 1 of the process to complete an Expense Report in iExpense.

The screenshot shows the Oracle E-Business Suite Navigator page. At the top left is the Research Foundation logo and name. The page title is 'E-Business Suite'. On the right, there are links for 'Diagnostics', 'Logout', 'Preferences', and 'Help', and the user is logged in as '650MULTUNRH'. The 'Navigator' section is highlighted with a circled '1'. Below it, a list of responsibilities is shown: '650 Internet Expenses Audit Manager', 'HR Self Service - CO', and 'ORG Internet Expenses'. The '650 Internet Expenses Audit Manager' is highlighted with a box and a blue arrow with a '2' pointing to it. A 'Please select a responsibility.' message is displayed. To the right, the 'Favorites' section is empty, with a message: 'You have not selected any favorites. Please use the "Edit Favorites" button to set up your favorites.' At the bottom, there are links for 'Diagnostics', 'Logout', 'Preferences', and 'Help', and a 'Privacy Statement' link. Copyright information is also present.

1	From this initial screen when logged in to Oracle, here is the list of available Oracle responsibilities for the user
2	Select <i>ORG Internet Expenses</i>



3

## Expenses Home

[Create Expense Report](#) | [Import Spreadsheet](#) | [Export Spreadsheet](#)

### Track Submitted Expense Reports

The following expense reports are either outstanding or have been paid in the last 30 days.

Report Number	Report Submit Date	Report Status	Last Report Status	Activity (Days)	Current Approver	Receipts	Status	Report Total (USD)	Purpose	Duplicate	Withdraw
---------------	--------------------	---------------	--------------------	-----------------	------------------	----------	--------	--------------------	---------	-----------	----------

No results found.

[?](#) If the status is Pending Your Resolution, you were sent a notification explaining the required action.

2

### Update Expense Reports

Click an Update icon to make changes to a saved, rejected, or returned expense report.

1

Report Number	Report Date	Status	Report Total (USD)	Purpose	Update	Duplicate	Delete
IE10122	15-Nov-2010	In Progress	365.76	AP Conference in Orl...			

### Notifications

View

Select From	Subject	Sent	Due
There are no notifications in this view.			

TIP [Vacation Rules](#) - Redirect or auto-respond to notifications.

TIP [Worklist Access](#) - Specify which users can view and act upon your notifications.

3

[Create Expense Report](#) | [Import Spreadsheet](#) | [Export Spreadsheet](#)

1	From the <i>Expenses</i> Homepage, you will see a list of the existing expense report(s)
2	You can use these icons to Update, Duplicate or Delete an existing expense report, OR
3	Click the <b>Create Expense Report</b> button from either the top or bottom menus to create a new expense report



Contact: rftravel@rfsuny.org

The screenshot shows the 'Create Expense Report: General Information' form. It includes fields for Name (Multunas, Ms. Rheta Zink (29974)), Location (650), Reimbursement Currency (US Dollar), Expense Template (Domestic Travel), Travel Start Date, and Travel End Date. The form has a progress indicator at the top showing 'General Information' as the current step. Navigation links like 'Global Policy' and 'Home' are visible in the top right.

1	Complete all required fields (* Indicates required field)
2	Use the <b>Calendar</b> icons to enter the <i>Travel Start Date</i> and <i>Travel End Date</i> of your travel. The date format in Oracle applications is DD-MMM-YYYY. Ex: 01-JAN-2011
3	<p><b>Note:</b> Expense Template drop-down menu:</p> <ul style="list-style-type: none"> <li>• Domestic Travel (default)</li> <li>• Foreign Travel</li> <li>• Miscellaneous Expenses</li> </ul>
4	Per diems for foreign travel must be calculated manually. Links to applicable websites for foreign per diems rates are provided within the <b>Global Policy</b> link



**Create Expense Report: General Information**

• Indicates required field

Name **Multunas, Ms. Rhetta Zink (29974)**

• Location **650**

Expense Template **Domestic Travel**

• Destination and/or Purpose

Reimbursement Currency **US Dollar**

**Additional Information**

• Travel Start Date

• Travel End Date

**Save** **Cancel** **Step 1 of 4** **Next**

1	Your <i>Name</i> and <i>Location</i> flood in automatically based on your login information <b>Note:</b> If you have been authorized to create expense reports on behalf of others, you will see a drop-down menu here so you can change the name
2	Type in the <i>Destination and/or Purpose</i> of your trip. Example: HR conference in New Orleans, LA
3	<b>Save</b> button saves your progress without navigating away from this screen <b>Cancel</b> button returns you to Expenses Homepage <b>Next</b> button saves your progress and takes you to <i>Create Expense Report: Cash and Other Expenses</i> page, Receipt-based

You have successfully created an Expense Report in iExpense.

Use the Job Aids for Step 2 to proceed and enter different types of expenses and the details.