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

1. From this initial screen when logged in to Oracle, here is the list of available Oracle responsibilities for the user.

2. Select ORG Internet Expenses
From the Expenses Homepage, you will see a list of the existing expense report(s)

You can use these icons to Update, Duplicate or Delete an existing expense report, OR

Click the Create Expense Report button from either the top or bottom menus to create a new expense report
**Job Aid**

Create an Expense Report in *iExpenses* Module

**Contact:** rftravel@rfsuny.org

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1. Complete all required fields (* Indicates required field)

2. Use the **Calendar** icons to enter the **Travel Start Date** and **Travel End Date** of your travel. The date format in Oracle applications is DD-MMM-YYYY. Ex: 01-JAN-2011

3. **Note:** Expense Template drop-down menu:
   - Domestic Travel (default)
   - Foreign Travel
   - Miscellaneous Expenses

4. Per diems for foreign travel must be calculated manually. Links to applicable websites for foreign per diems rates are provided within the **Global Policy** link

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Research Foundation of SUNY
1. Your Name and Location flood in automatically based on your login information. **Note:** 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 Destination and/or Purpose of your trip. Example: HR conference in New Orleans, LA.

3. **Save** button saves your progress without navigating away from this screen. **Cancel** button returns you to Expenses Homepage. **Next** button saves your progress and takes you to Create Expense Report: Cash and Other Expenses 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.