

# Claim Project Related Expenses

Guidance for claiming expenses related to a project code.

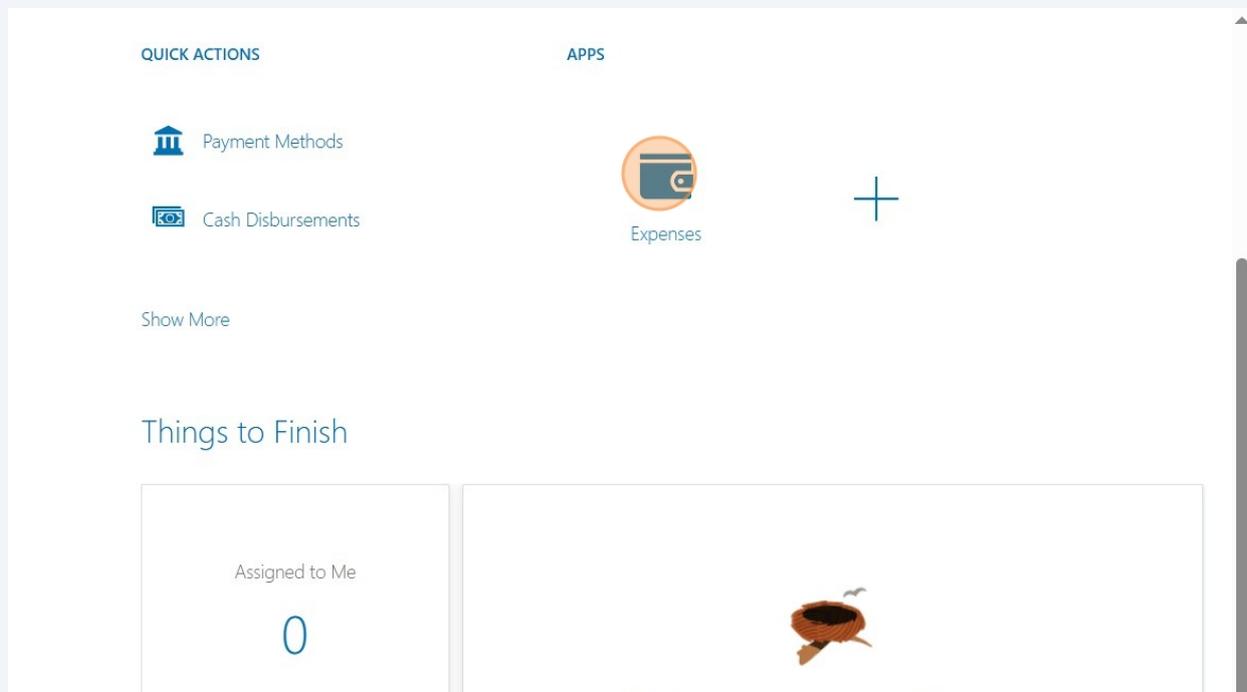
1 Log in to Oracle Fusion Cloud Applications"



Before you start make sure you have:

1. Entered your bank details in Oracle.
2. Know the project code you need to charge.
3. Have copies of receipts to upload.

2 From the home page, click on Expenses.



### 3 Click Create Report.

The screenshot shows the 'Travel and Expenses' interface. At the top, there's a navigation bar with the University of St Andrews logo and a search bar. The main section is titled 'Expense Reports' and features a 'Create Report' button with a plus icon. To the right, there are three report cards, each labeled 'Not Submitted' and 'Updated 2 days ago'. The first card is for 'Project expense' with an amount of 220.00 GBP. The second is for 'Mileage' with 0.00 GBP. The third is for 'Med dem expenses' with 0.00 GBP. Below these is a section for 'Available Expense Items (2)' with a table. The table has columns for Date, Type, Amount, Merchant, Location, and Description. One item is listed: 01/07/24, Mileage - Petrol, 45.90 GBP, United Kingdom, and Add description.

Date	Type	Amount	Merchant	Location	Description
01/07/24	Mileage - Petrol	45.90 GBP		United Kingdom	Add description

 Tip! Any fields with "\*" are mandatory.

4

Enter the "Purpose" of the expense, e.g. "Conference". This will populate the detail code for the expense.

The screenshot shows the 'Create Expense Report' form in the University of St Andrews system. The header includes the university logo and navigation icons. The form title is 'Create Expense Report' with 'Save', 'Submit', and 'Cancel' buttons. The 'Purpose' field is empty and highlighted with an orange circle. The 'Report Total' is 0.00 GBP. Below the form is an 'Expense Items' section with buttons for 'Actions', '+ Create Item', 'Add Existing', 'Apply Project', 'Apply Account', and 'Split Allocation'. The text 'No data to display.' is shown below the items section.

5

Click "Create Item"

The screenshot shows the 'Create Expense Report' form with the 'Purpose' field containing the text 'conference'. The 'Report Total' remains 0.00 GBP. The '+ Create Item' button in the 'Expense Items' section is highlighted with an orange circle. The rest of the form and header are identical to the previous screenshot.

6 Enter the current day's date.

University of St Andrews

Create Expense Item

Create Another Save and Close Cancel

\* Date dd/mm/yy

\* Type

\* Amount GBP

Reimbursable Amount 0.00 GBP

7 From the drop down in the "Type" field, select the "Training & Conference" option.

University of St Andrews

Create Expense Item

Create Another Save and Close Cancel

\* Date 01/07/25

\* Type Training & Conference

\* Amount GBP

Reimbursable Amount 0.00 GBP

## 8 Click the "Expense Location" field.

Create Expense Item Create Another Save and Close Cancel

\* Date: 01/07/25

\* Type: Training & Conference

\* Expense Location: Search...

\* Amount: GBP

Reimbursable Amount: 0.00 GBP

Description:

Merchant Name:

\* Itemization: + - ☰ Remaining Balance 0.00

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
<input type="text"/>	dd/mm/yy			0.00+	<input type="checkbox"/>	<input type="button" value="x"/>

Attachments: Drag files here or click to add attachment

Receipt missing

## 9 From the drop down in the expense location field, click "Search..."

\* Date: 01/07/25

\* Type: Training & Conference

\* Expense Location: Search...

\* Amount: Afghanistan

Reimbursable Amount: Aland Islands

Description: Albania

Merchant Name: Algeria

\* Itemization: American Samoa

Antigua and Barbuda

Search...

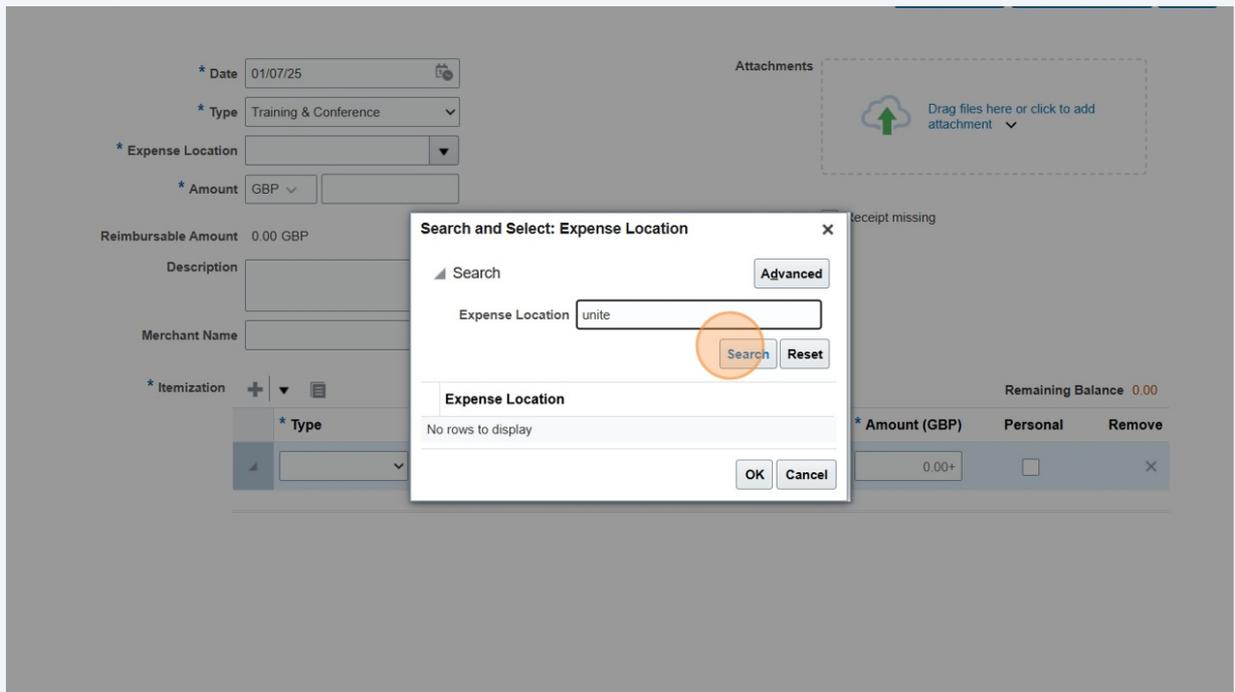
Attachments: Drag files here or click to add attachment

Receipt missing

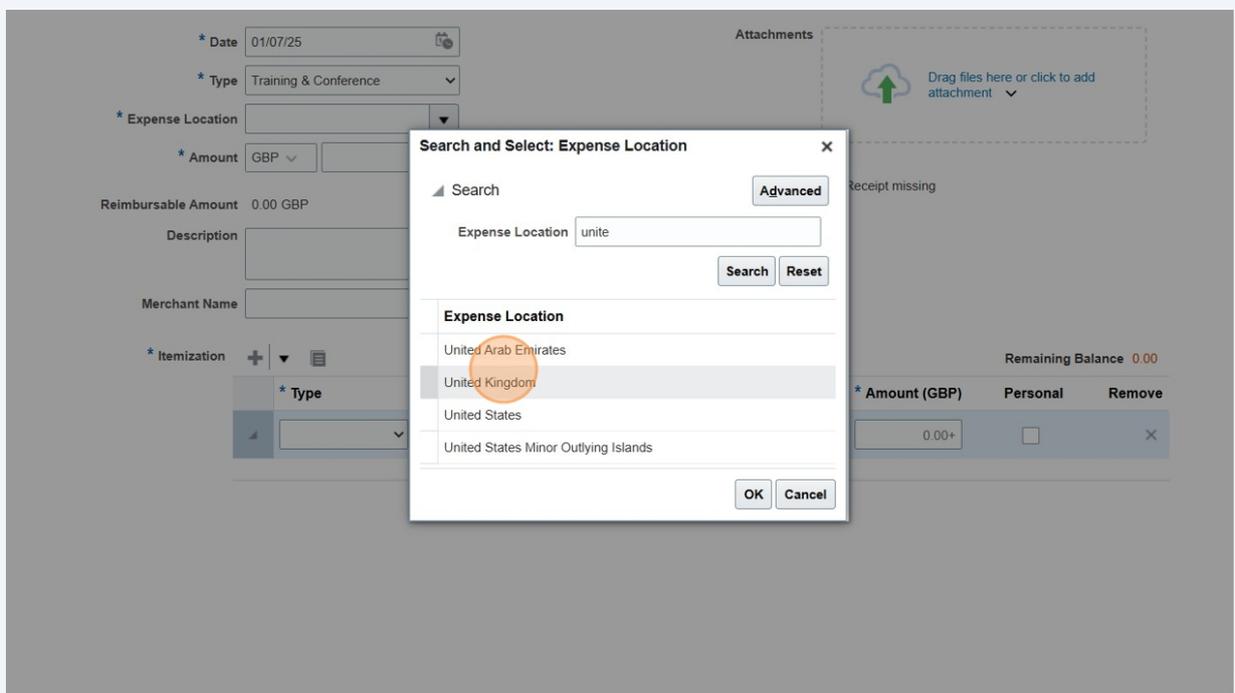
Remaining Balance 0.00

Daily Amount	Days	* Amount (GBP)	Personal	Remove
		0.00+	<input type="checkbox"/>	<input type="button" value="x"/>

10 Start typing the first letters of the country, e.g. "unite" and click "Search"



11 Select the relevant country, e.g. "United Kingdom" and then "OK"



12

Click the "Amount" field and enter the **full** amount of the claim. E.g. if you are adding lines for conference fee and subsistence, add these together and separate line items can be added.

Create Expense Item Create Another Save and Close Cancel

\* Date: 01/07/25

\* Type: Training & Conference

\* Expense Location: United Kingdom

\* Amount: GBP [Amount field highlighted with orange circle]

Reimbursable Amount: 0.00 GBP

Description: [Empty text field]

Merchant Name: [Empty text field]

\* Itemization: [Add icon] [Dropdown] [List icon] Remaining Balance 0.00

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
[Dropdown]	dd/mm/yy			0.00+	<input type="checkbox"/>	X

Attachments: [Drag files here or click to add attachment]  Receipt missing

13

Enter a brief "Description".

Create Expense Item Create Another Save and Close Cancel

\* Date: 01/07/25

\* Type: Training & Conference

\* Expense Location: United Kingdom

\* Amount: GBP [Amount field: 220] Example format: ###0.00;-###0.00

Reimbursable Amount: 0.00 GBP

Description: [Description field highlighted with orange circle]

Merchant Name: [Empty text field]

\* Itemization: [Add icon] [Dropdown] [List icon] Remaining Balance 0.00

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
[Dropdown]	dd/mm/yy			0.00+	<input type="checkbox"/>	X

Attachments: [Drag files here or click to add attachment]  Receipt missing

## 14 Select the Type "Conference fees"

\* Date

\* Type

\* Expense Location

\* Amount

Attachments   
  Drag files here or click to add attachment

Receipt missing

Reimbursable Amount 220.00 GBP

Description

Merchant Name

\* Itemization

Remaining Balance 220.00

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
<input type="text" value="Conference fees"/>	<input type="text" value="dd/mm/yy"/>	<input type="text" value="0.00+"/>		<input type="text" value="0.00+"/>	<input type="checkbox"/>	<input type="button" value="x"/>

## 15 Enter the date of the conference.

\* Expense Location

\* Amount

Attachments   
  Drag files here or click to add attachment

Receipt missing

Reimbursable Amount 220.00 GBP

Description

Merchant Name

\* Itemization

Remaining Balance 220.00

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
<input type="text" value="Conference fees"/>	<input type="text" value="dd/mm/yy"/>	<input type="text" value="0.00+"/>		<input type="text" value="0.00+"/>	<input type="checkbox"/>	<input type="button" value="x"/>

Merchant Name

Description

Account

Project Number

Approver (\* required for projects only)

Task Number

Expenditure Organization

Contract Number

Funding Source

\* Business reason for expense

\* Start Date

\* End Date

\* Town and City

\* Conference/Course Fees

16

In the the "Amount" field, enter the cost of the conference fee. Note, this may be less than the total above.

\* Expense Location: United Kingdom

\* Amount: GBP 220.00

Reimbursable Amount: 220.00 GBP

Description: conference

Merchant Name:

\* Itemization

* Type	* Date	Amount (GBP)	Personal	Remove
Conference fees	18/06/25	0.00+	<input type="checkbox"/>	X

Remaining Balance: 220.00

Example: 04/09/25  
Enter a date between 04/09/23 and 05/09/25.

Merchant Name:

Description:

Account: 10-10081-431201-99999999-9999-9999€

Project Number:

Approver (\* required for projects only):

Task Number:

Expenditure Organization:

Contract Number:

Funding Source:

\* Business reason for expense:

\* Start Date: dd/mm/yy

\* End Date: dd/mm/yy

\* Town and City:

\* Conference/Course Fees:

17

The "Remaining Balance" shows the total still to be claimed.

Training & Conference 01/07/25

Save and Close Cancel

\* Date: 01/07/25

\* Type: Training & Conference

\* Expense Location: United Kingdom

\* Amount: GBP 220.00

Reimbursable Amount: 220.00 GBP

Description: conference

Merchant Name:

\* Itemization

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
Conference fees	18/06/25	0.00		0.00	<input type="checkbox"/>	X

Remaining Balance: 220.00

Attachments: Drag files here or click to add attachment

Receipt missing:

Merchant Name:

Description:

Account: 10-10081-431201-A0000000-DOPS-999€

\* Contract Number: 102044

\* Funding Source: University of Glasgow

\* Business reason for expense: attendance at conference

\* Start Date: 18/06/25

18

The following box will appear. From the Analysis field drop down menu, select A0000000 at the top of the list.

The screenshot shows a software interface with a modal dialog box titled "Account". The dialog contains the following fields and options:

- Hide Segments
- Company: 10 UoStA
- Cost Centre: 10081 School of Medicine (School-wide)
- Detail Code: 431201 Conference costs
- Analysis: [Dropdown menu highlighted with an orange circle]
- SOF: [Dropdown menu]
- Spare: 9999999 Default - Spare
- Buttons: Search, Reset, OK, Cancel

The background form includes fields for Expense Location (United Kingdom), Amount (GBP 220.00), Description (conference), and Itemization (Conference fees).

19

Click the drop down menu in the "SOF" field. There will only be a choice of one. Select "DOPS"

The screenshot shows the same "Account" dialog box as in step 18, but with the "SOF" dropdown menu highlighted by an orange circle. The "Analysis" dropdown menu now displays "A0000000 Academic Unanalysed".

20 Click "OK"

The screenshot shows a software interface for entering an expense. A modal dialog box titled "Account" is open in the center. The dialog has a "Hide Segments" header and several dropdown menus. The "Company" field is set to "10" (UoStA). The "Cost Centre" field is set to "10081" (School of Medicine (School-wide)). The "Detail Code" field is set to "431201" (Conference costs). The "Analysis" field is set to "A0000000" (Academic Unanalysed). The "SOF" field is set to "DOPS" (Discretionary (ops budget)). The "Spare" field is set to "9999999" (Default - Spare). At the bottom of the dialog, there are four buttons: "Search", "Reset", "OK", and "Cancel". The "OK" button is highlighted with an orange circle. In the background, the main form is partially visible, showing fields for "Expense Location" (United Kingdom), "Amount" (GBP 220.00), "Reimbursable Amount" (220.00 GBP), "Description" (conference), and "Type" (Conference fee).

21 Type the amount of the conference fee

22

Click the "Project Number" field and enter the project code to be charged.

PLEASE MAKE SURE YOU ARE CHARGING THE CORRECT CODE.

The screenshot shows an expense form with the following fields and values:

- \* Type: Training & Conference
- \* Expense Location: United Kingdom
- \* Amount: GBP 220.00
- Reimbursable Amount: 220.00 GBP
- Description: conference
- Merchant Name: (empty)
- \* Itemization: + (expanded)
- Itemization Table:

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
Conference fees	18/06/2025	0.00+		220.00	<input type="checkbox"/>	×
- Account: 10-10081-431201-A0000000-DOPS
- Project Number: (empty, highlighted with an orange circle)
- Approver (\* required for projects only): (empty dropdown)
- Task Number: (empty)
- Expenditure Organization: (empty)
- Contract Number: (empty)
- Funding Source: (empty)
- \* Business reason for expense: (empty)
- \* Start Date: dd/mm/yy
- \* End Date: dd/mm/yy
- \* Town and City: (empty)
- \* Conference/Course Fees: (empty)
- Remaining Balance: 0.00

23

Click drop down menu in the "Approver (\* required for projects only)" field. There will only be a choice of one, select this. This is the person who is assigned to approve the expense.

The screenshot shows the same expense form as above, but with the following changes:

- Project Number: 10004776
- Approver (\* required for projects only): (highlighted with an orange circle, showing a dropdown menu)

24 Click the "Task Number" field and enter "1".

\* Expense Location

\* Amount

Reimbursable Amount 220.00 GBP

Description

Merchant Name

\* Itemization

Remaining Balance 0.00

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
Conference fees	18/06/2025	0.00+		220.00	<input type="checkbox"/>	<input type="button" value="x"/>

Merchant Name

Description

Account

Project Number

Approver (\* required for projects only)

Task Number

Expenditure Organization

\* Contract Number

\* Funding Source

\* Business reason for expense

\* Start Date

\* End Date

\* Town and City

\* Conference/Course Fees

25

The Contract Number and Funding Source will auto populate.

Click the "Business reason for expense" field and enter a reason, e.g. name of conference.

\* Expense Location

\* Amount

Reimbursable Amount 220.00 GBP

Description

Merchant Name

\* Itemization    Remaining Balance 0.00

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
Conference fees	18/06/2025	0.00+		220.00	<input type="checkbox"/>	<input type="button" value="x"/>

Merchant Name

Description

Account

Project Number

Approver (\* required for projects only)

Task Number

Expenditure Organization

\* Contract Number

\* Funding Source

\* Business reason for expense

\* Start Date

\* End Date

\* Town and City

\* Conference/Course Fees

26

Enter the start and end dates of the conference.

\* Expense Location

\* Amount

Reimbursable Amount 220.00 GBP

Description

Merchant Name

\* Itemization    Remaining Balance 0.00

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
Conference fees	18/06/2025	0.00+		220.00	<input type="checkbox"/>	<input type="button" value="x"/>

Merchant Name

Description

Account

Project Number

Approver (\* required for projects only)

Task Number

Expenditure Organization

\* Contract Number

\* Business reason for expense

\* Business reason for expense

\* Start Date

\* End Date

\* Town and City

\* Conference/Course Fees

27 Enter the location of the conference in the "Town and City" field.

\* Expense Location

\* Amount

Reimbursable Amount 220.00 GBP

Description

Merchant Name

\* Itemization

Remaining Balance 0.00

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
Conference fees	18/06/2025	0.00+		220.00	<input type="checkbox"/>	<input type="button" value="x"/>

Merchant Name

Description

Account

Project Number

Approver (\* required for projects only)

Task Number

Expenditure Organization

\* Contract Number

\* Funding Source

\* Business reason for expense

Example: 04/09/25

End Date

\* End Date

\* Town and City

\* Conference/Course Fees

28 Click the "Conference/Course Fees" field.

\* Expense Location

\* Amount

Reimbursable Amount 220.00 GBP

Description

Merchant Name

\* Itemization

Remaining Balance 0.00

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
Conference fees	18/06/2025	0.00+		220.00	<input type="checkbox"/>	<input type="button" value="x"/>

Merchant Name

Description

Account

Project Number

Approver (\* required for projects only)

Task Number

Expenditure Organization

\* Contract Number

\* Funding Source

\* Business reason for expense

\* Start Date

Town and City

\* Town and City

\* Conference/Course Fees

29 Type " Conference fees"

30 You will see that the remaining balance in this example claim is now £0.00 and the claim may be submitted.

Date: 01/07/2025

\* Type: Training & Conference

\* Expense Location: United Kingdom

\* Amount: GBP 220.00

Reimbursable Amount: 220.00 GBP

Description: conference

Merchant Name:

\* Itemization: +

Remaining Balance: 0.00

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
Conference fees	18/06/2025	0.00+		220.00	<input type="checkbox"/>	X

Merchant Name:

Description:

Account: 10-10081-431201-A0000000-DOPS-9999

Project Number: 10004776

Approver (\* required for projects only): kr16@st-andrew

Task Number: 1

\* Contract Number: 102044

\* Funding Source: University of Glasgow

\* Business reason for expense: attendance at conference

\* Start Date: 18/06/25

\* End Date: 20/06/25

\* Town and City: Glasgow

\* Conference/Course Fees: Conference fees

Drag files here or click to add attachment

Receipt missing

### 31 If you did have additional lines to add, click on the + symbol and repeat

Date: 01/07/2025

\* Type: Training & Conference

\* Expense Location: United Kingdom

\* Amount: GBP 220.00

Reimbursable Amount: 220.00 GBP

Description: conference

Merchant Name:

\* Itemization:   

Remaining Balance: 220.00

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
Conference fees	18/06/25	0.00		0.00	<input type="checkbox"/>	

Merchant Name:

Description:

Account: 10-10081-431201-A0000000-DOPS-999

Project Number: 10004776

Approver (\* required for projects only): kr16@st-andrew

Task Number: 1

\* Contract Number: 102044

\* Funding Source: University of Glasgow

\* Business reason for expense: attendance at conference

\* Start Date: 18/06/25

\* End Date: 20/06/25

\* Town and City: Glasgow

\* Conference/Course Fees: Conference fees

Receipt missing

### 32 You must upload a copy of any associated receipts

Date: 01/07/2025

\* Type: Training & Conference

\* Expense Location: United Kingdom

\* Amount: GBP 220.00

Reimbursable Amount: 220.00 GBP

Description: conference

Merchant Name:

\* Itemization:   

Remaining Balance: 0.00

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
Conference fees	18/06/2025	0.00+		220.00	<input type="checkbox"/>	

Merchant Name:

Description:

Account: 10-10081-431201-A0000000-DOPS-999

Project Number: 10004776

Approver (\* required for projects only): kr16@st-andrew

Task Number: 1

\* Contract Number: 102044

\* Funding Source: University of Glasgow

\* Business reason for expense: attendance at conference

\* Start Date: 18/06/25

\* End Date: 20/06/25

\* Town and City: Glasgow

\* Conference/Course Fees: Conference fees

Receipt missing

### 33 Click "Save and Close"

University of St Andrews

Create Expense Item

[Create Another](#) [Save and Close](#) [Cancel](#)

\* Date: 01/07/2025

\* Type: Training & Conference

\* Expense Location: United Kingdom

\* Amount: GBP 220.00

Reimbursable Amount: 220.00 GBP

Description: conference

Merchant Name:

\* Itemization

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
Conference fees	18/06/2025	0.00+		220.00	<input type="checkbox"/>	X

Remaining Balance: 0.00

Merchant Name: Contract Number: 102044

Description: Funding Source: University of Glasgow

Business reason: attendance at conference

Attachments: Drag files here or click to add attachment

Receipt missing

### 34 Click "Cancel"

University of St Andrews

Create Expense Item

[Create Another](#) [Save and Close](#) [Cancel](#)

\* Date: 01/07/25

\* Type: Training & Conference

\* Expense Location: United Kingdom

\* Amount: GBP 220.00

Reimbursable Amount: 220.00 GBP

Description: conference

Merchant Name:

\* Itemization

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
Conference fees	18/06/25	220.00		220.00	<input type="checkbox"/>	X

Remaining Balance: 0.00

Merchant Name: Contract Number: 102044

Description: Funding Source: University of Glasgow

Business reason: attendance at conference

Attachments: Drag files here or click to add attachment

Receipt missing

### 35 Click "Save and Close"

University of St Andrews

Create Expense Item

[Create Another](#) [Save and Close](#) [Cancel](#)

\* Date: 01/07/2025

\* Type: Training & Conference

\* Expense Location: United Kingdom

\* Amount: GBP 220.00

Reimbursable Amount: 220.00 GBP

Description: conference

Merchant Name:

\* Itemization: +

* Type	* Date	Daily Amount	Days	* Amount (GBP)	Personal	Remove
Conference fees	18/06/2025	220.00		220.00	<input type="checkbox"/>	×

Remaining Balance: 0.00

Merchant Name:

Description:

\* Contract Number: 102044

\* Funding Source: University of Glasgow

\* Business reason: attendance at conference

Attachments: Drag files here or click to add attachment

Receipt missing

### 36 This will take you back to the expense report. If you have additional expenses, e.g. for subsistence, mileage, train fare etc, click "+ Create Item" as in step 5 and repeat.

Expense Report: UoStA000022749971

[Save](#) [Submit](#) [Cancel](#)

\* Purpose: conference

Missing Images Reason:

Status: Saved

Report Total: 220.00 GBP

I 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
01/07/25	Training & Confere 1 itemization	220.00 GBP		United Kingdom	conference	<a href="#">Add attachment</a> Original receipt required

37

If you are ready to submit, tick the box next to the date. Tick that you have read the policies, once you have done so (step 39).

Expense Report: UoStA000022749971 Save Submit Cancel

\* Purpose

Missing Images Reason

Status Saved

Report Total  
**220.00** GBP

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

Expense Items (1)

Actions + Create Item Add Existing Apply Project Apply Account Split Allocation

<input type="checkbox"/> Date	Type	Amount	Merchant	Location	Description	Attachments
<input type="checkbox"/> 01/07/25	Training & Confer 1 itemization	220.00 GBP		United Kingdom	conference	<a href="#">*Add attachment</a> Original receipt required

38

Click here.

University of St Andrews Home Star Flag RS

Expense Report: UoStA000022749971 Save Submit Cancel

\* Purpose

Missing Images Reason

Status Saved

Report Total  
**220.00** GBP

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

Expense Items (1)

Actions + Create Item Add Existing Apply Project Apply Account Split Allocation

<input checked="" type="checkbox"/> Date	Type	Amount	Merchant	Location	Description	Attachments
<input checked="" type="checkbox"/> 01/07/25	Training & Confer 1 itemization	220.00 GBP		United Kingdom	conference	<a href="#">*Add attachment</a> Original receipt required

Select MISC 2025-07-01

39 The submit button will then be available for you to click and send for approval.



If you receive any error messages, go back in to the claim and review.

Ensure you have entered your bank details.

If there are still issues, contact [medicinefinance@](mailto:medicinefinance@) or the Oracle Expenses Teams channel for assistance.