UF Office of Human Resource Services
Training and Organizational Development
UNIVERSITY of FLORIDA.

Using an Allocation Spreadsheet

This guide is designed for reviews and approvers in myUF Payment Solutions. To complete the process described below, you must have the UF_SY_BUSUNIT_UFLOR role *and* either the UF_AP_Reviewer *or* UF_AP_Approver security role in myUFL. For a complete coverage of content and skills related to myUF Payment Solutions, please see the appropriate online course for your role in the system: PST967 myUF Payments for Reviewers or PST970 myUF Payments for Approvers.

To access myUF Payment Solutions, use the following steps:

- Visit http://my.ufl.edu
- Click the Access myUFL button
- Enter your GatorLink username and password
- Click the Login button
- Click Main Menu > My Self Service > myUF Payment Solutions

Use the Allocations Spreadsheet feature in myUF Payment Solutions to store commonly used ChartField rows for easy upload into the Allocations section of an invoice.

1. From the Inbox, open an invoice by clicking the **Work Invoice** button.

2. Within the Allocations tab, you can enter ChartField information one field at a time. Another method is to upload the information via spreadsheet. Let's explore this latter method now.

3. In the **Allocations** section, scroll right and view the rest of the row.

4. To download the Excel template, click the **Download Allocations Template** icon.

5. Click the **Download Template** button.

6. Click the **Open** button.

7. In the Excel spreadsheet, click the **Enable Editing** button.

8. Enter the ChartFields you would like to upload on a regular basis. You can enter multiple rows of ChartField strings for split distributions.

9. **Save** your spreadsheet.

10. Click the **Upload Allocations Template** button to upload the spreadsheet allocations.

11. Click the **Browse** button, navigate to the location where your spreadsheet is saved, and open it.

12. Click the **Upload Spreadsheet** button.

13. Error messages display if there is missing information in the spreadsheet.

14. Complete the spreadsheet per the error message instructions, and then click the **Save** button.

15. Repeat the steps to upload the spreadsheet. This will load the ChartField information into the Allocations section of the myUF Payment Solutions screen.

If you need help with...

- Technical issues, contact the UF Help Desk:
    o 392-HELP(4357)
    o helpdesk@ufl.edu

- Procedures, Policies and Directives, contact University Disbursements:
    o 392-1241
    o Disbursements@ufl.edu