

This guide is designed for individuals responsible for submitting his or her own travel transactions or travel transactions for others. To complete these tasks, you must have the UF_EX_EMPLOYEE security role. To learn more, consider taking PST930 Travel and Expense.

INTERNATIONAL TRAVEL

In an effort to ensure the safety of all members of the UF community who travel abroad, please print and complete the [University of Florida International Travel Check List](#). Submit the list to the person in the department who is responsible for entering the Travel Authorization into the Travel and Expense Module.

For more information about international travel requirements including the International Travel Registration requirement, please visit the UF International Center website at <http://ufic.ufl.edu/travelregistration.html>

1. Login to **myUFL**
 - Open an internet browser
 - Navigate to my.ufl.edu
 - Click the Access myUFL button
 - Enter your GatorLink username and password
 - Click the Login button
2. Navigate to: **Main Menu > My Self Service > Travel and Expense > Travel Authorizations.**
3. The options on the Travel Authorization page of the Employee T&E Center include:
 - **Create/Modify** a new Travel Authorization to submit for approval or save for later or to change an existing Travel Authorization
 - This will be the most common action from this page
 - **View** the status of a Travel Authorization
 - **Cancel** a Travel Authorization that has already been approved
 - **Print** a hard copy of a Travel Authorization
4. Click the **Create/Modify** link.
 - To create a Travel Authorization for yourself, skip to step 10
 - To create a Travel Authorization on behalf of someone else, complete steps 7-9
5. Click the **Look up Empl ID** button.
6. Click the **Look Up** button.
7. Click the traveler to select him or her.
 - If no employees are present on the list, check with your Departmental Security Administrator to ensure that you have been given proper security for the individuals in your area
 - For a non-employee you must first "Add a Non-Employee" to get the employee added to your list

- Review the **Travel and Expense for a Non-Employee** instruction guide
8. Click the **Add** button.
9. Complete the **Description** field.
- Provide a general description of the travel in this field
 - This field will hold up to 30 characters
 - Will be used as a searchable identifier later
 - Be sure to enter a description that will be easily recognizable to you
10. Select the **Business Purpose** from list.
- Click drop down menu and select reason for trip as the business purpose
 - If your choice is not listed, find one that comes closest or select *Miscellaneous*
11. Enter or select the **Default Location**.
- The Default Location is the ultimate destination of the travel
 - This location will populate the Details page of Expense Types selected
 - Use the following methods to search for a destination:
 - Typeahead - Enter the first few letters of the city, a list matching your entry will appear. Select from the list
 - Enter the first few letters of the city, and then click the Search icon. All cities that start with those letters will be shown
 - Review the instruction guide titled "Default Locations"
 - It is now the Default Location
 - If your city is not listed, select the "closest" and call the Travel Office at 392-1245 to have the correct city added to the list
 - This is critical, since locations must appear on the list correctly to submit an Expense Report after the travel
12. Select or enter the **Date From:** and the **Date To:**
- To select the date:
 - Click calendar icon
 - Make sure to select correct month
 - Must be today's date or a date in the future
13. In the **Comment** field enter the Benefit to Grant/Project or Benefit to UF.
- Enter a more detailed description of why the travel is necessary
 - If grant funded, be sure to relate directly to any grant language concerning travel
 - Do not use abbreviations
14. Click the **Accounting Defaults** link to verify or modify the ChartFields.
- Modification options include:
 - Change ChartFields as needed
 - Add rows to split cost of entire Travel Authorization
 - Modify or split the cost of the entire travel transaction
 - Use the Add ChartField Line button to add an additional row
 - Use the % field to identify the percentage for each funding source
 - Complete the rest of the ChartFields

15. Click the **OK** button.
16. Select **Expense Types** from the drop down list.
17. For each **Expense Type**, complete the appropriate fields.
 - Date – Enter the date the expense is to be incurred
 - Amount – Enter the estimated amount. For some expenses, the amount will populated after completing the details page
 - Currency – No changes can be made
 - Payment Type – For each expense, select the appropriate payment type:
 - Avis Company Travel
 - Compl Trvl-Non
 - PP/Direct Payment
 - Personal Funds
 - UF PCard
 - Billing Type
 - The Billing Type depends on Payment Type:
 - For "Personal Funds," the Billing Type is based on the ultimate destination of the trip. Select In-state, Out-of-state, or Foreign from the dropdown
 - For all Payment Types other than "Personal Funds" the Billing Type is "PC/PP Expense"
18. Click the **Detail** link for each Expense Type.
 - The Date, Payment Type and Billing type will be populated with the information you entered and selected on the previous page
 - You can made changes if needed

Each Expense Type has different requirement on the Details page. Here are a few notes:

Mileage

- Map Mileage is the linear distance traveled to and from a destination
- Vicinity Mileage is within the destination
 - Enter the number of miles for this expense
 - For common mileage values refer to the Mileage Chart at www.fa.ufl.edu
 - Click the Calc Mileage action button
 - Calculates dollar amount, but leaves you on this page to modify or add other information
 - Based on mileage rate at date of expense
 - Amount is updated
- Enter the Number of Passengers
 - At least one passenger must be listed
 - Only include passengers on official UF Business
- Originating and Destination Locations
 - These locations are populated based on the Default Location you entered on the General Information section of the Travel Authorization Entry page
 - You can enter the city or search using the Lookup button
 - For more information, review the "Default Locations" instruction guide
 - Originating Location
 - Change this field to the city from which the travel will originate
 - Destination Location
 - Enter the ultimate destination of the travel
 - Because format counts, it is best to select locations using the search function
- Description
 - Enter the names of the additional passengers

- If no other passengers, type "N/A" or "No Additional Passengers"

Airfare

- Enter the Ticket Number
 - If the ticket has not been purchased when you are creating this transaction, enter "Pending"
- The Originating Location is where the plane leaves the ground
- Enter the Merchant
 - There is no preferred merchant for airlines
 - Enter the name of the airline
- In the Travel To field,
 - Select the city to which you are traveling
 - If not on list, select the closest location and call the Travel Office at 392-1245 to have the city added
 - City must be correct on Expense Report
- In the Description field,
 - Enter "Coach" or "Economy." "First Class" and "Business Class" are not allowed
- The Amount field will be populated with the amount you entered on the Details section of the Travel Authorization Entry page

Lodging

- Enter the Number of Nights
 - This number will be used to calculate the total amount for lodging
- Enter the Merchant
 - Since there is not preferred merchant for lodging, enter the name of the hotel.
- Enter or search for the Location of the hotel
- In the Nightly Rate field, enter the amount per night
 - Note the system will calculate the total lodging amount

For any Expense Type you can click the Accounting Detail link to modify the ChartFields to pay the expense type from a different funding source or to split it between two or more funding sources.

19. After completing the detail for each Expense Type, click the **Return to Travel Authorization Entry** link.

To copy expenses

- Click the Select checkbox next to the Expense Type you want to copy
- Click the Copy Selected button
- Review the details of each of the copied expenses and adjust the fields as needed

20. Click the **Check For Errors** button.

- Errors will be noted by a red flag by each Expense Type that requires attention
- Click the red flag to go to the details page for the expense
- Make corrections as needed

21. Click the **Return to Travel Authorization Entry** link

22. Click the **Submit** button.

- Click the **Save for Later** to save the transaction and return to it later

23. At the confirmation page, click the **OK** button.

- The Authorization ID number is at the top
- The Last Updated date will reflect the day you created this Travel Authorization
- As the creator, your name will appear in the By: field

To keep this Instruction Guide brief, Map Mileage, Airfare, and Lodging are the only Expense Types covered. For information on other Expense Types, it is recommended that you complete the PST930: Travel and Expense training class. If you have immediate needs that are not met by this Instruction Guide or the Travel Handbook, please contact the Travel Office at 392-1245.

If you need help with...

- Technical issues, contact the UF Help Desk at 392-HELP or helpdesk@ufl.edu
- Policies and Directives, contact the Travel Office at 392-1245