Follow the steps in the instruction guide to create, edit and retrieve travel templates in myUFL.

After adding a new template, you will complete the template by adding a Description and the Expense Types you would like to appear on the template.

**Template Notes:**
- When you create a template, it is for your use only, no other user can see it or access it
- Once created, you can apply a template to your transaction
- You must have created the template for the right type of transaction
- You cannot apply a Travel Authorization template to an Expense Report

To complete these tasks, you must have the UF_EX_EMPLOYEE security role. To learn more, consider taking PST930 Travel and Expense.

1. Login to [myUFL](https://my.ufl.edu)
   - 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. Click the **Main Menu > My Self Service > Travel and Expense > User Preferences.**

3. Click the **Create/Update User Template** link.
   - If you wanted to *edit an existing template*, search for it here at Find an Existing Value.
   - For this example you will create a new one.

4. Click the **Add a New Value** tab

5. Enter a name for the template

6. Click the **Template Type** list

7. **Select the type of template** you want

8. Click the **Add** button

9. Click in the **Description** field

10. Enter a description into the **Description** field

11. Enter an abbreviated version of the description into the **Short Description** field

12. Click the **Expense Type** list

13. Select an expense type from the dropdown list
14. If you wanted to add more expenses, simply click the **Add New Row** button, represented by the + symbol at the right of the row

15. Click the **Save** button

16. Click the **OK** button

**Retrieve the template**

1. Click the **Main Menu** button

2. Point to the **My Self Service** menu

3. Point to the **Employee T&E Center** menu

4. Point to the **Expense Report** menu

5. Click the **Create** menu

6. Click the **Add** button

7. Click the **Quick Start** list

8. Click the **A Template** list item

9. Click the **GO** button

10. Click the **Select** button next to the template you want to retrieve

11. Select the **Date Range** options for which the travel will took place

12. Click the **All Days** option

13. Click the **OK** button
   - Note the expense type is present for each day you designated

14. Additional expenses can be added as needed by clicking the + symbol at the right of any row

15. Complete the rest of the Expense Report and submit it for approval

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 392-1241