Instruction Guide
Creating/Editing/Retrieving a Travel Template

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
   • 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 NavBar > 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
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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 392-1245