
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 **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 **Travel & Expense** menu
4. Point to the **Expense Report** menu
5. Click the **Create/Modify** menu
6. Enter **Empl ID**
7. Click the **Add** button
8. Click the **Quick Start** list
9. Click the **A Template** list item
10. Click the **GO** button
11. Click the **Select** button next to the template you want to retrieve
12. Select the **Date Range** options for which the travel will take place
13. Click the **All Days** option
14. Click the **OK** button
 - Note the expense type is present for each day you designated
15. Additional expenses can be added as needed by clicking the **+** symbol at the right of any row
16. 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