ADD AND/OR EDIT REPORT EXPENSE LINES

This guide provides information on adding and editing expenses in an expense report.

NAVIGATION

Access UF GO via **ONE.UF**, **myUFL**, or the **SAP Concur mobile app**

- **ONE.UF**: Log in to https://one.ufl.edu > Select **UF GO** under the Faculty/Staff section.
- **myUFL**: my.ufl.edu > My Self Service > **UF GO Travel and PCard**

LOGGING IN

1. Enter gatorlink@ufl.edu and click **Next**
2. Click **Sign in with University of Florida SSO**
3. Enter **UF gatorlink** and **password**

    Note: If you are already signed-in to myUFL or other UF system, this step will automatically skip.

ADD EXPENSES TO REPORT

The following are the three ways to add expenses to a report.

AVAILABLE EXPENSES - MOVE TO OPTION

1. Click the **check box** next to the expense line in the **Available Expenses** section
2. Click the **Move to** button
3. Select an existing report or the **New Report** option

ADD EXPENSE WITHIN THE EXPENSE REPORT

ADD AVAILABLE EXPENSES

1. Click **Add Expense**
2. Select **Available Expenses** tab
3. Click check box of expense to add to the report
4. Click **Add to Report**

CREATE NEW EXPENSE

1. Click **Add Expense**
2. Select the **Create New Expense** Tab
3. Enter or Select **Expense Type**
4. Complete required fields
5. Click **Save Expense**

EDIT EXPENSE LINES

In each expense report, a user can edit, delete, copy, allocate, and move expense lines as needed.

- **Edit**: Edit the details in the expense detail screen
- **Delete**: Remove expense line from the report. The expense will return to the Available Expenses section
- **Copy**: Create an identical expense line as the original. Receipts would need to be attached to the copy expense
- **Allocate**: Enter a different Chartfield string for an expense line than the Report Header Chartfield string
- **Combine**: Merge two expense lines. Typically, this occurs between the estimated expense and the PCard/Air Card actual charge
- **Move to**: Select an expense line and move it to a different expense report

SINGLE EXPENSE

STEPS

1. Click on the **checkbox**
2. Select **Edit**
3. Make necessary adjustment in the expense detail screen

	Alerts ↑↓	Receipt ↑↓	Payment Type ≡	Expense Type ↑↓	Vendor Details ↑↓	Date ↑↓	Requested ↑↓	⌄
☑		GO	Personal Funds	Lodging Attendees (1)	Allegro Resorts Jupiter, Florida	02/08/2023	$500.00 Itemized	⌄

MULTIPLE EXPENSES

STEPS

1. Click on the **checkbox** next to the expense lines you wish to edit
2. Select the desired action on the right
    o **Edit** for multiple lines will work only on shared fields for the selected expenses

☑	Alerts ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ≡	Requested ↑↓
☑	🔴		Personal Funds	Lodging Attendees (1)	Hampton Inn & Suites Miami, Florida	12/20/2022	$100.00
☑	⚠️	Vie	Personal Funds	Food & Beverages - Dinner Attendees (6)	Pizza Palace	12/19/2022	$102.00

FOR ADDITIONAL ASSISTANCE

Technical Issues	Travel Policies and Directives	PCard Policies & Questions
The UF Computing Help Desk	Travel Office	PCard Team
352-392-HELP	352-392-1241	352-392-1331
helpdesk.ufl.edu	travel@ufl.edu	pcard@ufl.edu