Allocate Expenses to More than one Chartfield

Use this guide to enter more than one Chartfield on a Travel Request or Expense Reports.

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**

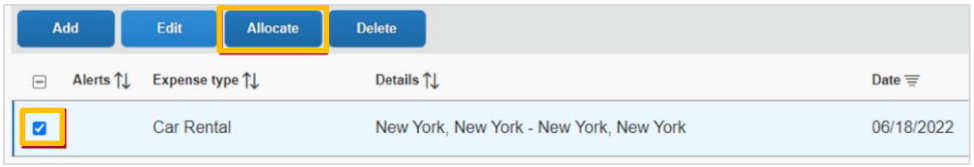
Note: If you are already signed-in to myUFL or other UF system, this step will automatically skip.

Allocate Expenses

Allocation can be done for a single or multiple expense lines.

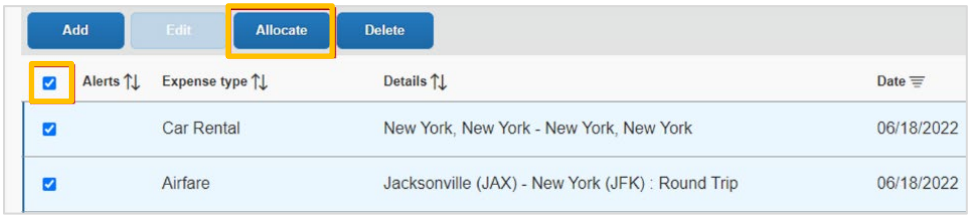
Single Expense Allocation

1. Click the **check box** of the expense you wish to allocate
2. Click **Allocate** button



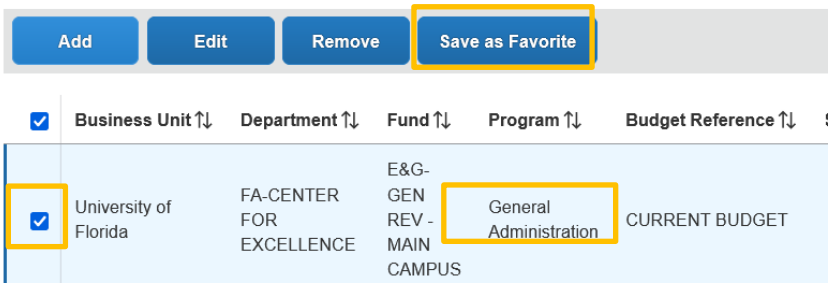
Multiple Expense Allocation

1. Click the **check box** on the left to select all expenses
2. Click **Allocate**



Allocate Screen

1. Choose to allocate by **percent** or **amount**
3. Click **Add**
4. Enter new Chartfield string
5. Click **Save**
6. Enter the percent or amount for the new allocation
7. Click **Save**

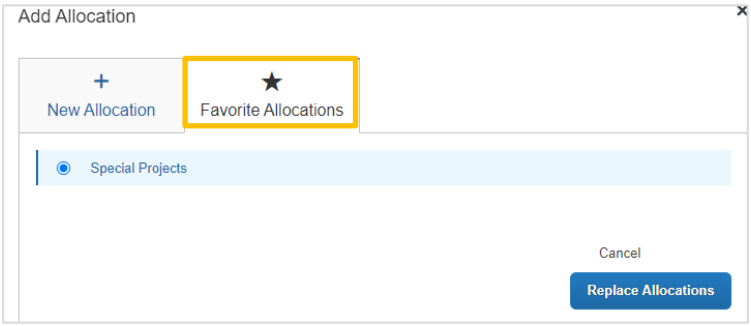


Add as a Favorite Allocation

1. Click on the newly added Chartfield string
2. Click the **Save as Favorite** button
3. Enter a descriptive name for Favorite

USE FAVORITE ALLOCATIONS

1. Click **Add** in the **Allocate** screen
2. Select **Favorite Allocation** tab
3. Select the desired favorite option
4. Click the **Replace Allocation** button
5. Enter percent or amount for the new allocation
6. Click **Save**



SUBMIT REPORT

Reminder! If you are a delegate and prepared this report on behalf of another user, once you click **Submit**, they will receive an overnight notification to log into UF GO to review and submit the travel expense report.

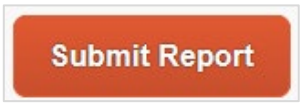
Once all expenses are entered, upon the submission of the expense report, the system may flag issues. Red alerts will need to be cleared prior to submission while yellow are typically informational.

ALERTS

	Red alert: Requires action, it indicates an item needs to be resolved before request can be submitted. Click on the alert to learn what needs to be fixed.
	Yellow alert: Informational, indicates the request has an exception or provides additional information. It is a good idea to review but will not prevent submission of the request.

STEPS

1. Click **Submit Report**
2. Review the User Electronic Agreement and click **Accept & Continue**
3. Review the Report Totals pop-up
4. Click **Submit Report**



The report is submitted and the approval workflow process initiated. The status of the report can be viewed on the **Manage Expenses** page.

FOR ADDITIONAL ASSISTANCE

Technical Issues
The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

Travel Policies and Directives
Travel Office
352-392-1241
travel@ufl.edu

PCard Policies & Questions
PCard Team
352-392-1331
pcard@ufl.edu