

FINANCIAL APPROVERS IN UF GO

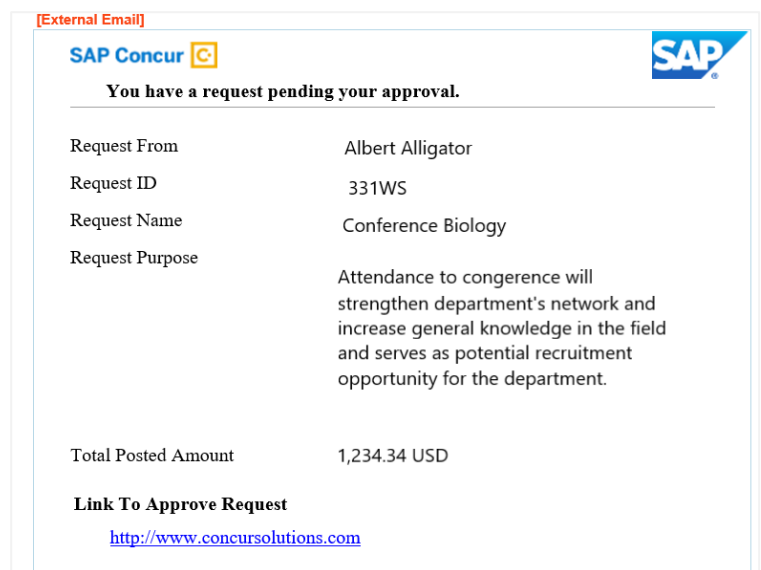
Financial Approvers are individuals with the financial authority to approve travel requests, cash advances, expense reports (travel and non-travel) and general reimbursements for faculty and staff within the unit and ensure the request or expense is appropriate, valid, within budget, and compliant to university policy and directives.

Financial approvers and delegate approvers will need to complete the **UF GO: What Approvers Need to Know (UGO220)** to get the appropriate access to UF GO. Once the training is completed, a DSA role must request the **UF_N_TPS_APPROVER** security role.

SYSTEM NOTIFICATION

Financial approvers receive an email notifying them of a pending Travel Request or Expense Report (travel, PCard, general reimbursement) pending their approval.

The financial approver can click on the link provided in the email and it will take them directly to the pending Travel Request or Expense Report (travel, PCard, general reimbursement).



NAVIGATION

Access UF GO via **ONE.UF** and **myUFL**

- **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.

REVIEW AND APPROVE

The approval module gives you access to all pending Travel Requests and Expense Reports (travel, PCard, general reimbursement).

STEPS

1. Access pending approvals from the **Approvals** module on the **Home** dashboard
2. Click the **Requests** or **Expense Reports** tab to access pending travel requests or expense report
3. Click on the **Request/Report Name** to open the pending travel request or expense report
4. Open the **Detailed Report** to view a full summary of all expenses, payment types and associated allocations (ChartFields)
5. Select **Individual Expenses** to view their details
6. Click on **Details** to view Report header information such as Chartfield string, comments, Report name, etc.
7. Click on the **Expense** tab to view detailed information of the expense
8. Click the **Receipt Image** tab to view attached receipt
9. Adjust information on the expense as needed.

Alert! If amount or Chartfield string is adjusted, the Request/Report will be sent back to the first step of the approval process.



This icon denotes an expense line that the financial approver is responsible for approving.

10. View additional information provided in the travel request or expense report

- **Receipts:** Documents attached to the Report
- **Print/Share:** A summary report of the travel request or expense report including Chartfield string, comments, approval workflow, and audit trail

11. Click **Approve** or **Send Back to User**

- **Approve:** Moves Report to the next step in the Approval Flow
- **Send Back to User:** If the Report needs corrections or is not approved, this sends it back to the traveler for correction and resubmission

ADD AN APPROVER

If you would like to add an approver to the approval workflow, review the [Add an Additional Approver](#) instruction guide.

EMAIL NOTIFICATIONS

In addition to the initial email indicating a Request or Report requires approval, financial approvers will receive email notifications if a Request or Report is still pending approval after a designated amount of time.

These notifications come from **EmailReminderService@concursolutions.com** and are not optional (i.e. users cannot opt out in their email settings). Delegates/Delegate Approvers with the **Receives Approval Emails** permission are cc'd on these notifications.

Tip! UF recommends marking @concursolutions email addresses as safe senders. Otherwise, the notification emails may filter to a spam folder.

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