Travel and Expense: Using the “Copy From” Feature

This instruction guide is designed for travelers and originators who need to create travel authorizations or expense reports similar to others that have already been submitted for approval. While “blankets” are no longer available, the “Copy From…” option is a great tool. When multiple travel situations arise that contain similar data—such as expenses or locations—a traveler or originator can create new travel authorizations or expense reports by copying an existing one.

To access the Travel and Expense pages to submit travel authorizations or expense reports, you must be assigned the role UF_EX_Traveler or UF_EX_Originator and attend the “Get Up and Go” hands-on training session for travel and expense reporting.

- Log into the system via the myUFL portal, using your GatorLink user id and password (http://my.ufl.edu).
- Navigate to the Travel and Expenses Home page > Employee Self-Service > Travel and Expenses > Travel & Expenses Home.

Copying Travel Authorizations
- From Travel & Expenses Home, Select Travel Authorization > Add > Add a New Value
- Select “Copy From Existing Travel Auth” and click “Continue”
- Use the date range fields and click “Search” at the top of the page to narrow your list of travel authorizations.
  - From the list, click “Select” next to the travel authorization you would like to copy.
  - Please note that the description link will only take you to a brief description of that travel authorization—it does not copy the travel authorization.
- When you “Select” a travel authorization to copy, the general information for the new travel authorization appears.
  - The new travel authorization is populated by the general information found in the original travel authorization, except for the dates.
    - Select the dates of the new travel authorization.
    - Verify or modify any of the other information.
    - Double-check the ChartField information in “Default Accounting for This Travel Authorization.”
- Click “Continue” to view the travel authorization summary, which is a copy of all the expenses listed on the original travel authorization.
  - Modify, add, or delete expenses as necessary.
  - Be sure to check the dates on each expense, which must fall within the date range of the travel authorization general information.
- When modifications are complete, select “Submit for Approval” and click through the “Ok” confirmation buttons.
  - You will then be taken to another travel authorization summary page, which will display the Travel Authorization ID number at the top right.
Select “Return to Transaction Start”

**Copying Expense Reports**

- From Travel & Expenses Home: Select Expense Report > Create/Update > Add a New Value.

- Select Copy From Existing Report and click “Continue”

- Use the date range fields and click “Search” at the top of the page to narrow your list of expense reports.
  - From the list, click “Select” next to the expense report you would like to copy.
  - The Description link will only take you to a brief description of that expense report—it does not copy the expense report.

- When you “Select” an expense report to copy, the general information for the new expense report appears.
  - The new expense report is populated with the general information from the original expense report, except for the dates.
  - Select the dates of the new expense report.
  - Verify or modify any of the other information.
  - Double-check the ChartField information in “Default Accounting for This Expense Report”

- Click “Continue” to view the expense report details, which is a copy of all the expenses listed on the original expense report.
  - Modify, add, or delete expenses as necessary.
  - Be sure to check the dates on each expense, which must fall within the date range of the expense report general information.

- When modifications are complete, select “Submit for Approval” and click through the “Ok” confirmation buttons.
  - You will then be taken to another expense report details page, which will display the Expense Report ID number at the top right.

- Select “Return to Transaction Start”

**If you need help with...**

- Technical problems, contact the UF Help Desk at 392-HELP or helpdesk@ufl.edu.

- Travel policies and procedures, review the Travel Handbook at http://www.fa.ufl.edu or contact the Travel Office at 392-1245.