Set Personalizations for Grant-Funded Travel

Designed for those responsible for submitting travel transactions on behalf of themselves or other employees of the University of Florida (security roles must include UF_EX_Originator or UF_EX_Traveler), this guide illustrates the procedures for modifying chartfield screens to help correctly process grant-funded travel transactions.

Notes

- When entering chartfield values for grant- or project-funded travel transactions, the order of entry is important.
  - For grant-funded travel transactions, you must fill in the PC Bus Unit field first, the Project field second, and the Activity field last.
  - It will be helpful to modify your chartfield pages according to the directions below, to place the fields mentioned above in a “left to right” order.
  - These directions will need to be followed from both the Travel Authorization page and the Expense Report page.

Default Accounting for This Travel Authorization/Expense Report

- From the Travel Authorization General Information page, select Default Accounting for This Travel Authorization.
  - If you are on the Expense Report Details page, select Default Accounting for This Expense Report.
- On the Default Accounting Page, there are two tabs for chartfields, GL Chartfields 1 and Projects Chartfields.
- In the horizontal blue stripe titled Accounting Summary, select the Set Personalizations link.
  - In the column on the left, click once on Project.
  - Click the small down arrow in the center of the page until Project is placed immediately below PC Bus Unit.
  - Your chartfields are now in the proper entry order for travel transactions funded by a grant or project.
  - Click OK at the bottom of the page.
  - This will return you to the Default Accounting for This Travel Authorization page.
  - Notice Project is now listed on the second page between PC Bus Unit and Activity, and the title of the second tab changes to GL Chartfields 2.
    - This order will allow for correct chartfield entry for travel transactions funded from a grant or project.

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.