

Quick Start for Faculty Travel (With Use of a Delegate)

Traveling? Your department may prefer that you use a delegate to assist you in creating travel authorizations and expense reports in the UGA Financial Management System. This guide will assist you in assigning a delegate, creating travel authorizations and expense reports, and using the My Wallet feature of the UGA Financial Management System.

Before you leave:

- Enable ArchPass Duo for your mobile device or set up an alternate phone: <http://archpass.uga.edu>
- Install Cisco AnyConnect (VPN) on computers used off campus and/or mobile devices.

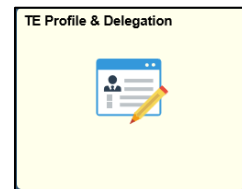
Logging in:

- Connect to Cisco AnyConnect (VPN) if off campus, using your computer or mobile device
- Access the UGA Financial Management System at financials.onesource.uga.edu
- When prompted, sign in using your MyID, password, and ArchPass Duo.

To request a delegate:

Only you can request a delegate to create travel-related documents on your behalf.

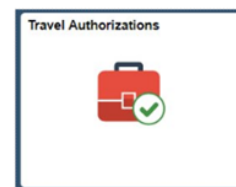
- Within UGA Financial Management, click the TE Profile & Delegation tile.
- On the Authorize Users page, click the + sign to add a new row.
- In this new row, within the Authorized User ID field, enter the MyID of the employee to which you wish to delegate authority.
- Under Expense Document Type, select Travel Authorization.
- Under Authorization Level, select Edit & Submit.
- Click the + sign to add a new row again.
- In this new row, within the Authorized User ID field, enter the MyID of the employee to which you wish to delegate authority.
- Under Expense Document Type, select Expense Report.
- Under Authorization Level, select Edit.
- Click the Save button to save your delegate selections.



To create a Travel Authorization:

Delegates can create, modify, and submit travel authorizations for you. However, you may be asked to complete part or all of this process, depending on your department's preference. If you need to start, modify, and/or submit a TA, follow the directions below.

- Within UGA Financial Management, click the Travel Authorizations tile. You will see a list of all TAs here. If you need to modify a TA that your delegate created for you, select the appropriate TA to review and submit as needed.
 - To create a new TA, click the Add Travel Authorization button on the Travel Authorization page.
 - Enter the requested information regarding your travel plans, including the accounting chartstring received from your department.
 - Click the Submit button.
- You can view the status of your travel authorization(s) from the Employee Self-Service menu by clicking Travel Authorizations > View All (on side menu).



Adding receipts to My Wallet:

You can take photos of your receipts then upload them to My Wallet for use in an expense report.

- Within UGA Financial Management, click the Expenses tile.
 - Click the Add Quick Expense tile.
 - Click the + icon to add an expense.
 - Provide the date of the expense, the appropriate expense type, a description, and the accurate amount.
 - Click the Attach Receipt link.
 - Click the Add Attachment button, then select the device you wish to upload from (My Device).
 - Locate the photo on your mobile device and upload it, then click the Done button.
 - Save the entry.
- You can view your My Wallet expense(s) from the Employee Self-Service menu by clicking Expenses > My Wallet.

To create an Expense Report:

A delegate can create and modify expense reports for you; however, **only the traveler can submit expense reports**. By submitting your own expense report, you are attesting that you incurred the expenses and that the amount is accurate. Your department may ask you complete at least part of this process in addition to submitting the report.

- Within UGA Financial Management, click the Expenses tile.
- To start a new report, click the Create Expense Report tile.
- Enter the requested information, including the accounting chartstring provided by your department.
- Enter the expense lines or import from MyWallet. For additional guidance on how to do this, please visit the OneSource Training Library at training.onesource.uga.edu.
- Click the Review and Submit button. (You will stop here and log out if waiting for accounting information from a delegate).
- Click the Submit button.

*To modify or submit an Expense Report created by a Delegate:*

- Within UGA Financial Management, click the Expenses tile.
 - Click on the My Expense Report tile.
 - In the side menu, click the Not Submitted link.
 - Click on the Expense Report you want to submit.
 - Click the Review and Submit button.
 - Click the Submit button.
- You can view the status of your expense report(s) from the Employee Self-Service menu by clicking Expenses > My Expense Reports > View All (from side menu).

Training Resources:

- Tutorials on how to use the UGA Financial Management System can be found in the OneSource Training Library @ training.onesource.uga.edu
- You can review the latest travel policies and procedures at the Finance & Administration Policies and Procedures website @ policies.uga.edu/travel