Travel Instructions

Traveling? Here is how to use the UGA Financial Management System to submit travel authorizations and travel-related expense reports.
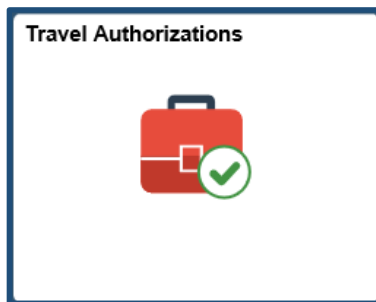
Before you leave:
- Ask your department if you will use a "delegate" for your travel authorizations and/or expense reports. A delegate is a person authorized to create, modify, and submit travel authorizations for you. They can also create and modify expense reports for you.
- Enable ArchPass Duo for 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: https://eits.uga.edu/access_and_security/infosec/tools/vpn/

If you do not use a delegate, you can create Travel Authorizations and Expense Reports on your own by completing the following steps:
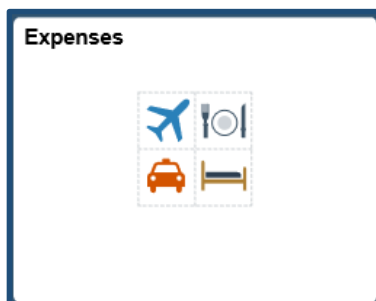
1. Connect to Cisco AnyConnect (VPN) if off campus, using your computer or mobile device
2. Access the UGA Financial Management System at financials.onesource.uga.edu
3. When prompted, sign in using your MyID, password, and ArchPass Duo.

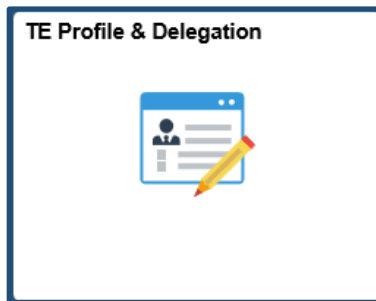| *To create a Travel Authorization*	
Travel Authorizations	1. Within UGA Financial Management, click the **Travel Authorizations** tile. 2. Click the **Add Travel Authorization** button. 3. Enter the requested information regarding your travel plans, including the accounting tag – a ten-character code you receive from your department. In place of the accounting tag, you can enter the full chartstring the department can provide. 4. Be sure to review your accounting details before submitting. If your department code lists "74999999", you *MUST* change that to reflect the appropriate unit, college, or school. 5. Click the **Submit** button.
To create an Expense Report **Expenses**	1. Within UGA Financial Management, click the **Expenses** tile. 2. Click the **Create Expense Report** tile. 3. Enter the requested information, including the accounting tag – a ten-character code you receive from your department. In place of the accounting tag, you can enter the full chartstring the department can provide. 4. Enter the expense lines or import from MyWallet. ***Note:** During or after travel, you can take pictures to document your receipts and upload them to MyWallet. For instructions on how to do this, please visit the OneSource Training Library at training.onesource.uga.edu. 5. Click the **Review and Submit** button. 6. Be sure to review your accounting details before submitting. If your department code lists "74999999", you *MUST* change that to reflect the appropriate unit, college, or school. 7. Click the **Submit** button.

Travel Instructions

If you will use a delegate to complete Travel Authorizations and/or Expense Reports, please complete the following steps:

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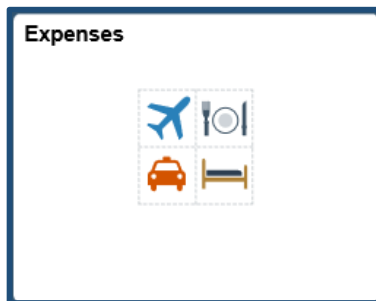3. When prompted, sign in using your MyID, password, and ArchPass Duo.

To request a delegate **TE Profile & Delegation**	1. Within UGA Financial Management, click the **TE Profile & Delegation** tile. 2. On the Authorize Users page, click the **[+]** sign to add a new row. 3. In this new row, within the **Authorized User ID** field, enter the MyID of the employee to which you wish to delegate authority. 4. Under Expense Document Type, select **Travel Authorization**. 5. Under Authorization Level, select **Edit & Submit**. 6. Click the **[+]** sign to add a new row again. 7. In this new row, within the **Authorized User ID** field, enter the MyID of the employee to which you wish to delegate authority. 8. Under Expense Document Type, select **Expense Report**. 9. Under Authorization Level, select **Edit**. 10. Click the **Save** button to save your delegate selections. ***Note:** Delegates can create, modify, and submit travel authorizations for you. They can also create and modify expense reports for you; however, only the traveler can submit expense reports. Your submission of the expense report serves as your signature that the expenses reported are correct as submitted.
To submit an Expense Report **Expenses**	1. Within UGA Financial Management, click the **Expenses** tile. 2. Click on the **My Expense Report** tile. 3. In the side menu, click the link to **Not Submitted**. 4. Click on the Expense Report you want to submit. 5. Click the **Review and Submit** button. 6. Click the **Submit** button.

Additional Travel Information

- Tutorials on how to use the UGA Financial Management System can be found in the OneSource Training Library at training.onesource.uga.edu.
- Additional information about UGA business travel can be accessed at travel.uga.edu.
- You can review the latest travel policies and procedures at https://busfin.uga.edu/accounts_payable/travel/.