

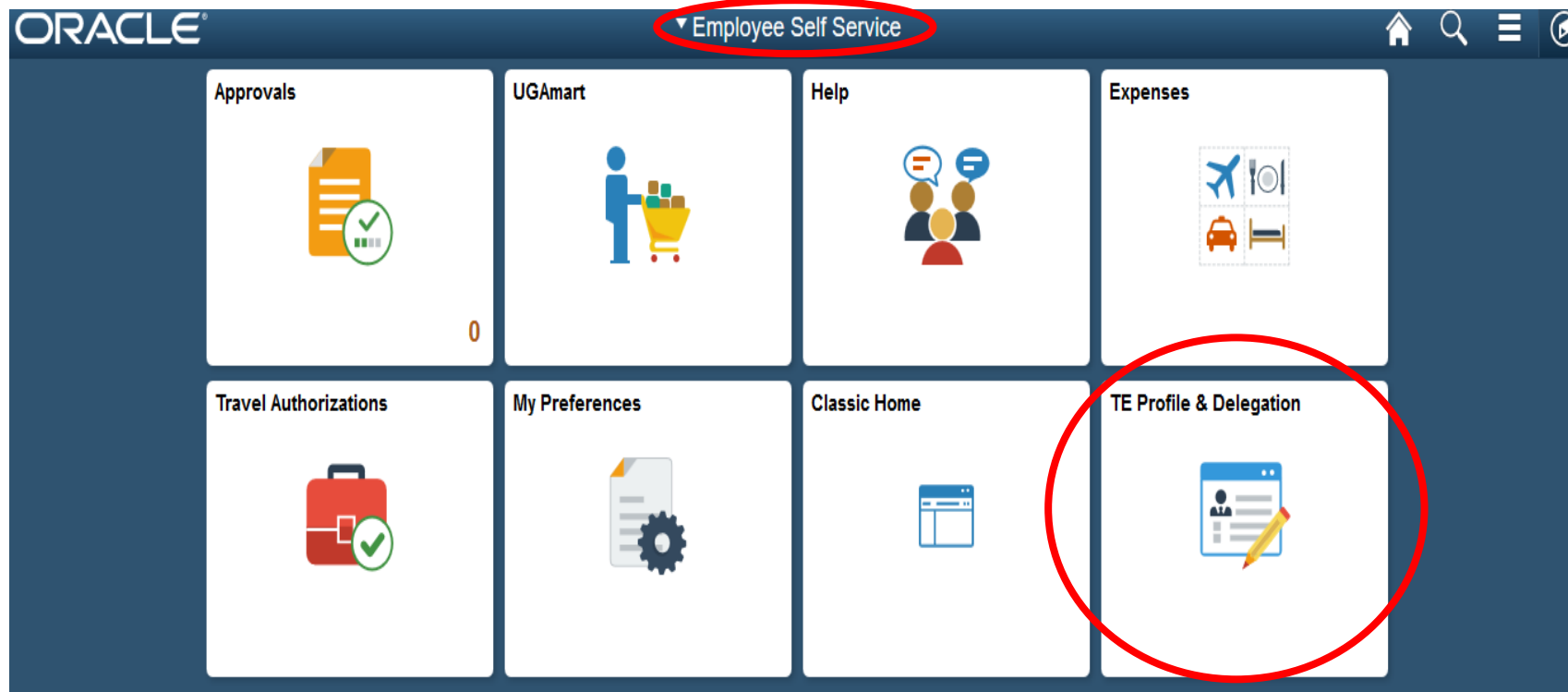
# OSE Guide to OneSource

## *Default Settings*

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Log into *financials.onesource.uga.edu* using your my ID, password, and arch pass duo pass code/call/push notification. If you are accessing the website off campus you will also need to have a Cisco any-connect VPN installed on your computer. Once logged in, make sure the screen says **“Employee Self Service”** at the top, then click **“TE Profile & Delegation.”**



Click **“Review/Edit Profile”** on the next screen.

Employee Self Service

UGA Profile

Delegate Entry Authority

Review/Edit Profile

Review Payments

Authorize Users

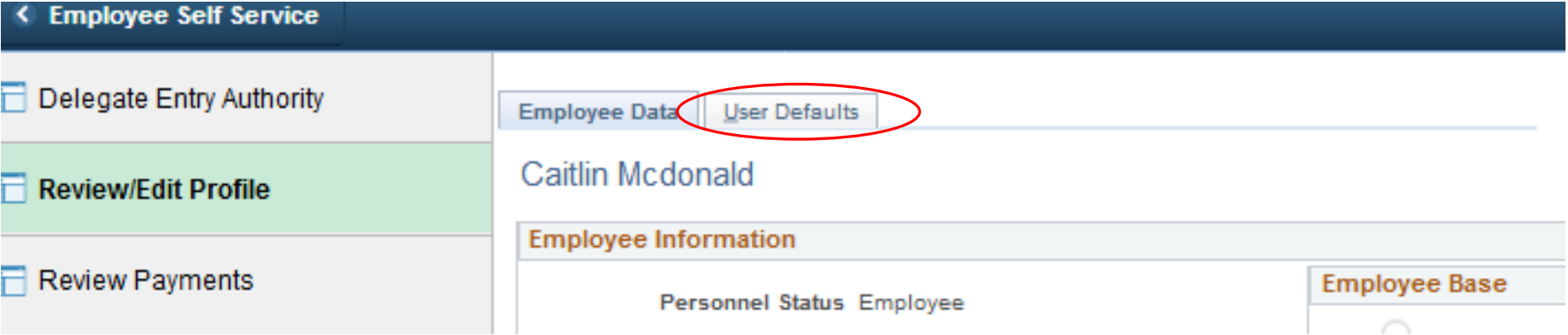
Caitlin Mcdonald

Entering new UserIDs on this page will give those users the ability to enter expense transactions on behalf of the employee.

Authorize Users

*Authorized User ID	Name	Expenses Document Type	*Authorization Level
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Click "User Defaults" at the top of the next page:



Employee Data | User Defaults

Caitlin McDonald

**Default Creation Method**

\*Expense Report Open a Blank Report

\*Time Report Open a Blank Report

\*Travel Authorization Open a Blank Authorization

**Expense Defaults**

Report Description

Business Purpose

Originating Location HEADQ

Expense Location

Transportation ID

Accounting Detail Default View Collapsed

Per Diem Range

Billing Type Default Value

Payment Type EMP Employee Paid

Credit Card

Number of Nights

You will only need to edit under the "**Expense Defaults**" section.

You can leave "**Business Purpose**" blank as you will select whether your reimbursement is non-travel, in-state travel, or out-of-state travel on each individual reimbursement.

Change "**Originating Location**" to HEADQ. Start typing 'headquarters' and it should appear for you to select.

Change "**Billing Type**" to default value.

Change "**Payment Type**" to EMP for Employee Paid.

Scroll down to bottom of page and click "**Save**".

Employee Data | User Defaults

Save Return to Search

Warning -- The Status Date of credit card is blank, are you sure you want to save it? (10070,383)

If you get this error, click "OK".

OK

Cancel

*Congratulations! You've set up your default settings!*