July 3

Readiness
Daily Status Call
Agenda

• Important:
  • If you have questions on items covered, please send those to onesource@uga.edu

• Shout out

• Service Desk

• Topics/Issues
Shout Out!

• Congratulations to the **1,300** users who logged into UGA Financial Management on July 2!!

• Thank you to our partners in these units who visited Caldwell yesterday to work on transactions and help us identify and issues.

  • EITS – Pam Burkhart, Jennifer Dobbs, Julie Dorsey, David Stewart, Thomas Bone, Chris Baines, Dennis Flint, Melanie Crawford, David Crouch, Robert Ethier, Kristianna McDaniel, Donna Chandler

  • SPIA – Penny Benton, Laurel Palmer, Meredith Dewald

  • AA & VPI – Toni Rogers

  • President’s Office – Janet Lance
Service Desk

• Hours of Operation
  • System available: Monday-Friday, 7 a.m.-6 p.m.
    • Excluding Holidays - for example July 4th
  • Service Desk open: Monday-Friday 8 am.-5 p.m.
  • Between 7/2 and 7/13, daily scheduled maintenance hours: Monday-Friday 6 p.m.-7 a.m.

• Contact Service Desk at onesource@uga.edu
Service Desk Volume – July 2

• Service Desk stats as of 4:30 p.m. on 7/2/18
  • 261 new cases opened; closed 101 of them the same day

• 151 still open (some cases entered before 7/2) but assigned for resolution
Service Desk - Inquiries

• Wide variety of inquiries topics
  • UGA Cash Management (TouchNet) access
  • Vendors address not present: Vendors were converted with one address. If you need an addresses added for a vendor, contact the service desk and they will route it to A/P.
  • “Walk me through the process”
  • We are seeing PC BU entered in a few instances where it is not needed. We believe this is due to the positioning of PC BU on the screen. We will re-order the chart fields on the screen to alleviate this.
  • When approvers in the same pool concurrently update the transaction, this can create an error depending on the timing.
Awareness Topics

• Alternate approvers are alternates for all transactions, regardless of whether they are budgetary or supervisory.

• Units may go ahead and budget FY19 DSS and Continuing Ed funds when they are ready—revenue and expense budgets.

• There is no need to send sub-award invoices to SPA. Once UGAmart is available, we will need to convert 500 sub-awards into UGAmart. Please hold these invoices until we notify you that conversions are complete. If you have a urgent payment to process, please contact the Service Desk and they will route it for processing.

• Reminder: CBOs have permissions in the system to add and edit approvers for their departments.
Awareness Topics

• Reminder: Department numbers established for “budgetary” only purposes can only be used for budget journals and transfers. If you use them on other types of transactions they will fail.

• We will provide additional clarification on this topic Thursday, July 5th during the status call.
“How do I view my budget?”
• See new training materials in the Training Library

With the launch of the Data Warehouse, reporting tools will change at UGA. The Data Warehouse is the repository where the institution’s data will exist to primarily support the analytics needs of UGA.

Reporting and the Data Warehouse are associated with the following courses:
• Understanding the Data Warehouse
• Getting Started with Reporting

Module Resources
reports.uga.edu
Data Warehouse Architecture Diagram
Data Warehouse PPT Presentation
Data Warehouse and Reporting Strategy
Data Feed (lists the most common data that flows into the UGA Financial Management System)
Awareness Topics

• What is the ASR replacement?
  • In the future you will use a “Budget Status Report”
  • Reporting will evolve over time
  • More info coming on the Budget Status Report. You’ll be able to get budget status information from several platforms – UGA Budget Management, Data Warehouse, Simpler

• OneSource is contacting Project Coordinators and CBOs to schedule Reporting Workshops with schools/colleges/units

• We recommend you start with budget reports such as:
  • Chartstring Budget Detail – in UGA Budget Management
  • Department Tree – in UGA Budget Management
  • For actuals detail, explore the Budget Status Report Cube in the Data Warehouse. This is a pivot table that downloads into Excel.

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New Known Issues

• **Resolved** – There was a typo on business unit which impacted workflow on vouchers and payment requests. This has been resolved.

• A user cannot be logged into WebDFS and Financial Management at the same time in the same browser.

• The Approval Fluid Screen reverses the sign for expenditure budget journals and transfers from what the Initiator Screen shows when it was initially keyed. We will post a job aid on this to the Training Library.

• Vendor conversion is still in process and vendors were converted with just one address.