July 10

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!

- Property Control/Asset Management Team:
  - Working with PO Conversion team to create asset profiles in UGAmart which are then transferred over to Asset Management Module. They are making great progress on this and prepping for the asset conversion coming mid-July.
Service Desk

• Hours of Operation
  • System available: Monday-Friday, 7 a.m.-6 p.m.
  • 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 - Inquiries

• Top four issues/inquiries for Monday, July 9:
  • Using Speedtypes in UGAmart: Remember to select the speedtype from the search feature. You cannot type in the speedtype. You can only select from the list of approved speedtypes.
  • Making corrections to the Reports To information in UGAJobs since that data drives the supervisor for travel authorities and travel expense. Financial Management is updated nightly with this information.
Awareness Topics

• UGAmart: setting up Chartstrings
  • Remember to use ++ to add Chartstrings when creating speedtypes for a profile in UGAmart.
  • Refer to the Training Library for a complete walkthrough of this process.
Awareness Topics

• Two Travel and Expense items during Split Implementation (July – December):
  • You will see a default Department ID (74999999) on Travel Authorizations and Expense screens
    • This is a placeholder and not a valid department ID
    • Remember to change this to a valid department ID, otherwise the item will be pushed back for correction.
  • For users who have the role to print expense reports:
    • Requestor’s name does not appear on the report
    • 74999999 appears for Department ID
  • The reason for Department ID 74999999 is that every employee has the ability to initiate a travel authority or expense statement and once we are live on OneUSG Connect, the employee’s HR department ID will display on travel and expense items. Until Finance can integrate with OneUSG Connect we are using the default department 74999999.
Awareness Topics

• GL Journals for Intra-University charges crossing funds
• System creates balancing entries and shows to the initiator
• *Used to happen behind the scenes*
• Example: “eTicket replacement” –
  • Entomology, paying with general funds (10500) to the Georgia Center, receiving to departmental sales funds (14000)
  • Entomology, paying with general funds (10000) to the Georgia Center, receiving to departmental sales funds (14000)
<table>
<thead>
<tr>
<th>Select</th>
<th>Line</th>
<th>Ledger</th>
<th>Account</th>
<th>Bud Ref</th>
<th>Fund</th>
<th>Program</th>
<th>Dept</th>
<th>Class</th>
<th>Fund Affil</th>
<th>Amount</th>
<th>Journal Line Description</th>
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<td>2019</td>
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<td>14400</td>
<td>19080SER</td>
<td>41500</td>
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<td></td>
<td>10000</td>
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<td>ACTUALS</td>
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<td>10000</td>
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<td></td>
<td>14100</td>
<td>1,624.23 Control Account - Cash - Int</td>
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**Totals**

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<th>Total Debits</th>
<th>Total Credits</th>
<th>Journal Status</th>
<th>Budget Status</th>
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</thead>
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<td>3,248.46</td>
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Awareness Topics

• Purchase Order (PO) conversion progress
  • PO Conversion Status as of Tuesday, July 10th
    • UGA had 4,885 open POs to Convert
    • 3,044 (62%) have been converted to new UGAmart OneSource POs and are now encumbered in the UGA Financial Management System
    • 1,841 (38%) are in UGAmart pending as purchase requests and are being processed into POs which will then be encumbered in UGA Financial Management System
    • As POs are converted, Property Control/Asset Management team members are setting up asset profiles in UGAmart and those will move into Asset Management module
  • 49 NEW FY19 POs created in UGAmart
A purchase request in UGAmart dated before July 9 (7/9) is an IMS conversion purchase request.

- Don’t modify it.
- Don’t approve it.
- Please leave it where it is in UGAmart.

The PO conversion team will review and process it. If you open it up and it shows that it is assigned to Buyer = OneSource PO Conversion, please close it and let the conversion team complete the processing.
## Awareness Topics

<table>
<thead>
<tr>
<th>Requisition</th>
<th>PR Approvals</th>
<th>Comments</th>
<th>Attachments (6)</th>
<th>History</th>
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### General

- **Status**: Pending
  - Department Approval
- **Submitted**: 7/6/2018 9:07 AM
- **Cart Name**: 2018-07-06 tbrown1 13
- **Cart Description**: no value
- **Priority**: Normal
- **Requested Delivery**: no value
- **Ship Via**: Best Carrier-Best Way
- **Requisitioner**: TINA BROWN
- **Shopper**: Mitzi Prescott
- **Buyer**: 20
  - OneSource PO Conversion
- **Status**: no value
Known Issues

• **Resolved 7/9:** All known issues with the Access Request Form including:

  • Some users are receiving SQL errors when requesting roles via the Access Request Form (online in UGA Financial Management System).
  
  • Access Request Form - Temporary Limitation to Submit One Request Form Per User.
  
  • Access Request Form - Limited Error on CBO approval email notification.
  
  • Concurrent Access Requests
  
  • TouchNet Access Request Processing
New Known Issues

• No New Issues Identified Monday!