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!

• To all Users:
  • Thank you for your partnership and keeping us updated with your experiences.
  • Your calls and emails assist OneSource as we fix bugs and defects.
  • We could not do this without your support!

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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 issues/inquiries for Tuesday, July 10:
  • “How To” calls. The team assisted many users as they navigate the new processes to complete travel authorities and expense statements. The team also takes this opportunity to direct users to the Training Library for more in-depth explanations or to use as a “follow-along” reference. Many users are not aware the Training Library exists.
  • Reports To - we’ll discuss more under “known issues”
Awareness Topics

• Sub-award conversion has started
  • July 31 is the target completion date
  • Reminder that sub-award processing is now facilitated using UGAmart.
  • If during this conversion period you need to have a payment expedited, please contact the Service Desk at onesource@uga.edu
Awareness Topics

• UGAmart: setting up Chartstrings
  • Remember to use ++ to add Chartstrings when creating speedtypes for a profile in UGAmart.
  • Transactions made during the Works Blackout period have been loaded and in the OneSource Training Library there is a video, “Using SpeedTypes in Works,” on how to allocate transactions.
Awareness Topics

• Purchase Order (PO) conversion progress
  
  • PO Conversion Status as of Wednesday, July 11th
    
    • UGA had 4,885 open POs to Convert
    
    • 3,394 (69%) have been converted to ne UGAmart OneSource POs and are now encumbered in the UGA Financial Management System
    
    • 1,491 (30%) 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
    
    • 212 NEW FY19 POs created in UGAmart
Awareness Topics

- Vendor reported receiving a fax for a PO that was entered last year.
  - Part of the conversion process is to remove the distribution information on the PO so it is not re-issued to the vendor.
  - With the nearly 5,000 POs under conversion, it is understandable that a few may slip through. The team has already identified a few of these and contacted the vendor to cancel it.
  - If a vendor contacts you directly, tell them to ignore it, and
  - Send PO # to Chad Cox in Procurement for handling. chadcox@uga.edu
Awareness Topics

• Reminder:

• 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.

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### Awareness Topics

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<th>Requisition</th>
<th>PR Approvals</th>
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<th>Attachments</th>
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New Known Issue

• The supervisor (Reports To) information in UGA Financial Management System directs workflow. If it is incorrect, travel approvals route to the wrong individual.
  
  • Reports To data comes from UG AJobs and cannot be edited in Financial Management
  
  • Continue to make changes in UG AJobs
  
  • Reports To data is updated to Financial Management nightly. Changes made during the work day in UG AJobs will be available in Financial Management the following day.
  
  • Users have reported making changes in UG AJobs that are not updated in Financial Management. OneSource is reviewing these instances with UG AJobs – this is a priority item so we can make sure routing is accurate.
New Known Issues

• Some characters were truncated in the Project ID chartfield, resulting in an error on expense report submission.

  • Research shows that there were issues with a batch load, resulting in the truncation on about 300 Project IDs.

  • OneSource will correct the truncated IDs manually. Where there is not an obvious manual correction, we will reach out to Project Coordinators for departments.

  • Going forward, you should be able to use speedtypes and account tags that include these Project IDs without incident. (Note: remember to add the Budget Reference!)
New Known Issues

• Some approvers are receiving approval notification emails for users who are not in their workflow.
  • Only a few users have reported this, OneSource is investigating.