July 6

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!

• OneSource Service Desk – Working hard to get responses to your questions!
• Cohort 1 AR and Billing Teams:
  • Thanks to Administrative Services, Auxiliary Services, FACS, FMD, Graduate School, Law School, Marketing & Communications and Warnell School of Forestry for being our early adopters of the billing and AR functionality.
  • Auxiliary Services produced and sent the first invoice from the BI (billing) module this week.
  • Anuj Sinha in Warnell School of Forestry is conducting training in his school on using the AR module.
  • Thanks for paving the way for the next Cohort.
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

• Themes for Thursday July 5:
  • Continuing to work a number of TouchNet access requests
  • Users receiving combo edit errors
Awareness Topics

• To eliminate confusion between the “Approval of Travel Items” tile in Employee Self-Service and a separate Travel & Expenses tile on “UGA Financials”, the tile on “UGA Financials” was removed.
  • The functionality is still available in Classic View for users who are using it to manage their department’s travel workflow
  • Queries are also available to view a department’s travel workflow activity.
    • UGA_TE_EXPENSE_REPORT_STATUS
    • UGA_TE_TA_STATUS
Awareness
GL Journals for Intra-University Charges

• 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)
**Long Description:** RCLD Server Support Services for FY19: basic server service & support ($720); data backups for servers ($109.98); and virtual server hosting ($794.25). 

**Unit:** 18000  
**Journal ID:** 1000000177  
**Date:** 07/05/2018

### Lines

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<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>14400</td>
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<td>ACTUALS</td>
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<td></td>
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<td></td>
<td>10000</td>
<td>-1,624.23 Control Account - Cash - Int</td>
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<td></td>
<td>14100</td>
<td>1,624.23 Control Account - Cash - Int</td>
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### Totals

<table>
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<tr>
<th>Unit</th>
<th>Total Lines</th>
<th>Total Debits</th>
<th>Total Credits</th>
<th>Journal Status</th>
<th>Budget Status</th>
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<tbody>
<tr>
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<td>4</td>
<td>3,248.46</td>
<td>3,248.46</td>
<td>V</td>
<td>V</td>
</tr>
</tbody>
</table>
Awareness Topics

• The Data Warehouse did not update with 7/4/18 data:
  • Therefore, the data in UGA Budget Management and Simpler was as of 1:00am 7/4 and not 1:00 am 7/5.
  • Data Warehouse was updated mid-day and we were able to sync UGA Budget Management the afternoon of 7/5.
  • We were able to identify why the Data Warehouse update job failed at 1:00 am on 7/5 and we were also able to correct it going forward.
Awareness Topics

• Reminder: When submitting a chartfield addition request, please insert your unit’s CBO in the workflow routing so they can approve the request.

• Users are seeing chartfield combo edit errors
  • Budget journal and travel authorizations are two areas where these have been reported
  • Example: error returned is “Combo error for fields ACCOUNT/ CLASS_FLD/ DEPTID/ FUND_CODE/ PROGRAM_CODE/ BUDGET_REF in group EXPC”
  The issue in this case is that the Budget Reference is missing.
Travel Delegate Reminder

• If you are a delegate for a traveler, please remember you must pick the employee traveling as the first step.
• If you do not pick the appropriate traveler, you are completing the transaction as if you are the traveler.
• Approvers need to look at all the details before they select the approve key.
New Known Issues

• Email notifications from PO conversion activity in UGAmart
  • Some UGAmart users are receiving emails regarding purchase order activity that they have not initiated.
  • **These are conversion related and can safely be ignored.**
  • For this conversion timeframe we turned off the global email notifications in UGAmart to reduce emails during the conversion timeframe as much as possible.
  • It appears that some historical settings on user accounts are causing emails to be generated for some users.
  • UGAmart continues to look into the source of these emails.
New Known Issues

• SQL error when requesting roles via Access Request Form

  • We have tracked the error and it occurs when the user is already assigned to the role that is being requested on the form.
    • OneSource will work to correct this error.
  
  • The page has information about the roles a user already has, they are hidden and you need to expand the area. See next page with screen shot.

  • Additionally, the query PT_SEC_USER_ROLES can be used to look up a user ID and see which roles are assigned to it.
1. When initiating a new access request form, there is an accordion menu titled “View and remove any of the user’s current roles.”
2. Click on this menu and the users roles will display. Side note: this is also how supervisors can request to remove a role (see green arrow below).

<table>
<thead>
<tr>
<th>Access Request Number</th>
<th>Approval Status</th>
<th>Submitted By</th>
<th>User ID</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>shawnh</td>
<td>shawnh</td>
</tr>
</tbody>
</table>

* CFO Approver

Request access to OneSource Default Inquiry Roles Only

View and remove any of user's current roles

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Role Description</th>
<th>Users In Role</th>
<th>Role Not Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 UGA AP Post Award</td>
<td>Role Description</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 UGA AR Business Manager</td>
<td>Role Description</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>3 UGA AR Cntrl Dstrb Cust Sve</td>
<td>Role Description</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 UGA EX Distr HR Supervisor</td>
<td>Role Description</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 UGA Private Query Builder</td>
<td>Role Description</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 UGA SPA Admin</td>
<td>Role Description</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 UGA SPA Awarding Team</td>
<td>Role Description</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
New Known Issues

Wording on Confirmation Email when the security access has been provisioned:

• When Access Request Forms are completed at the Security workflow step, an ‘approved’ email is generated. This simply means that the OneSource Security Team has reviewed the request for accuracy as a quality control step, not that EITS is an ‘approver’ in the workflow.

• We are working to adjust the verbiage on these emails to avoid misperception that the Security Team is responsible for approving or denying these requests.
New Known Issues

- **RESOLVED 7/6 after 8:15am daily status call.** Budget Reference Chartfield is not yet a dimension in UGA Budget Management System
  - This is causing inflated FY19 values in budget summary totals and reports.
  - Only seen by users with UGA Budget Management roles.
  - OneSource will need to address this matter in two phases:
    - Short term solution is currently being tested. Stay tuned for more information on the correction of this. **COMPLETE 7/6**
    - Permanent solution under evaluation.
New Known Issues

• You cannot have two instances of UGA Financial Management open in the same browser
  • Pages will lock up or display an error
  • **Workaround**: open an instance of PeopleSoft in two different browsers (e.g. Firefox and Chrome)
  • **Workaround still in testing**: it may be possible to use the same browser with one regular window and the rest in incognito mode. We will update you Monday with these results.
New Known Issues

- **Resolved 7/4**: Travel authorization conversion – Location Codes, In/Out of State Flags, and Budget Checking Errors.
  - Expense Team has resolved conversion errors on location codes and In/Out of State Flags. Additionally, the system was requiring budget checking in error.

- **Resolved 7/5**: Travel authorization conversion – Amounts and Distributions
  - There were some conversion errors in this area. Corrections were updated to the system on July 5.
New Known Issues

• **Resolved but will monitor:**
  
  • Some users reported they were not receiving email notifications.
  
  • On 7/4: OneSource identified a small number of users without email addresses. Those addresses have been updated.
  
  • On 7/5: OneSource identified additional users without email addresses. Those have been updated.
  
  • OneSource will continue to monitor for any additional instances. Please email onsource@uga.edu if you are not receiving email notifications on transactions that send them.
  
  • Please note that when a delegate prepares a Travel Expense statement on behalf of the traveler, the system does not send an email to the traveler to submit. That communication is outside of the system.