

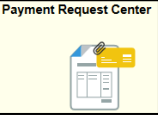

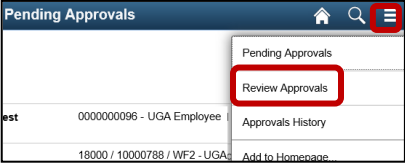



Viewing Transaction Status

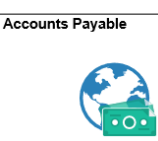
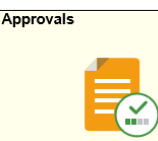
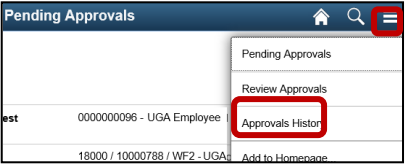
Viewing Financial Transaction Status

You can find the status of a transaction (or several transactions for a department) in different ways, depending on your role in the transaction and the available functionality of the system.

Payment Requests

If you are the initiator...		View your payment requests in the Payment Request Center, found on the UGA Financials homepage in Fluid.
If you are one of the transaction approvers...		<p>You can view all of your pending payment request approvals by clicking on the Approvals tile, then viewing by type.</p> <p>You can also view your approvals history on the Pending Approvals page by clicking on the action list menu in the top right corner of the screen, then selecting Approvals History.</p> 
Other ways to review transaction status (need security access)...		<p>View vouchered transactions from the Accounts Payable tile, found on the UGA Financials homepage in Fluid. Navigation in Fluid is UGA Financials homepage > Accounts Payable > My Reporting and Analysis > Voucher Inquiry. Search by Voucher ID.</p> <p>If you do not have the Voucher ID, you can also search in Classic for information by using the following navigation: Classic Home tile > Main Menu > Accounts Payable > Review AP Information > Payments > Document Status. Search by your desired criteria, including by payment request number, invoice number, and check number.</p> <p>If you have access to Query Viewer, you can use the following queries to locate information:</p> <ul style="list-style-type: none"> • UGA_AP_PAYMENT_REQ_DEPARTMENT (displays open payment requests by department) • UGA_AP_PMT_REQ_STATUS (displays current status of payment requests) • UGA_AP_PAYMENT_REQ_LKUP (provides a status of payment requests) <p>A list of useful links and queries can also be accessed directly in the Business Management Workcenter on the UGA Financials page in the UGA Financial Management System.</p>

AP Journal Vouchers

If you are the initiator...		View your AP JVs in the same place that you create them using the following Fluid navigation: Employee Self Service > UGA Financials homepage > Accounts Payable > My Vouchers > Add/View Vouchers . Access the Find an Existing Value tab to search.
If you are one of the transaction approvers...		<p>View your pending AP JV approvals by clicking on the Approvals tile, then viewing by type.</p> <p>You can also view your approvals history on the Pending Approvals page by clicking on the action list menu in the top right corner of the screen, then selecting Approvals History.</p> 



Viewing Transaction Status

Other ways to review transaction status (need security access)...

You may be able to view all journal vouchers for the University if you have the AP Inquiry role. Access this screen in the Classic Interface using the following navigation from the Employee Self-Service menu: **Classic Home tile > Main Menu > Accounts Payable > Review Accounts Payable Info > Vouchers > Voucher**. Search by your desired criteria, including supplier, date range, related PO, entry status, and more.

A list of useful links and queries can also be accessed directly in the Business Management Workcenter on the UGA Financials page in the UGA Financial Management System.

Travel Authorizations

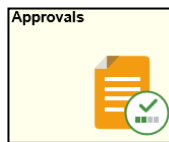
If you are the initiator...



View your pending TAs from the Travel Authorizations tile. This includes returned, pending, submitted, and approved TAs.

View your approvals and associated comments in classic mode: Navigation: **Classic Home tile > Main Menu > Travel and Expenses > Travel Authorization > View**. Search by EMPLID or Last Name.

If you are one of the transaction approvers...



View your pending TA approvals by clicking on the Approvals tile, then viewing by type.

View your approvals history on the Pending Approvals page by clicking on the action list menu in the top right corner of the screen, then selecting Approvals History.



Other ways to review transaction status (need security access)...

You may be able to view all TAs for the university if you have any View roles. Access this screen using the following navigation: **Classic Home tile > Main Menu > Travel and Expenses > Travel Authorization > View**. Search by your desired criteria, including authorization ID and employee name.

If you have access to Query Viewer, you can use the following queries to locate information:

- **UGA_TE_TA_STATUS** (displays TA approval status)
- **UGA_TE_TA_NOT_USED** (shows TAs that have travel dates that are due or have past, helps to follow up on outstanding TAs and close them when the trip did not occur)
- **UGA_TE_DEPARTMENT_REPORT** (shows all Travel and Expense for a submitted date range for departments)

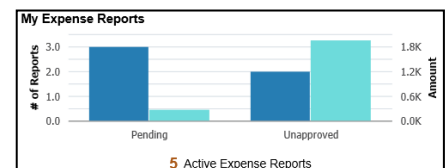
A list of useful links and queries can also be accessed directly in the Business Management Workcenter on the UGA Financials page in the UGA Financial Management System.

Expense Reports

If you are the initiator...

View your Expense Reports from the My Expense Reports tile. The menu allows you to view expense reports:

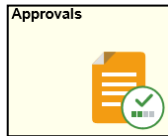
- Not Submitted
- Returned
- Awaiting Approval
- Pending Payment





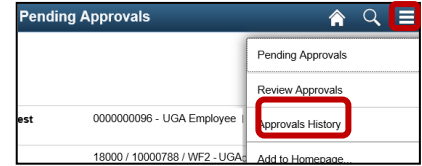
Viewing Transaction Status

If you are one of the transaction approvers...



View your pending expense report approvals by clicking on the Approvals tile, then viewing by type.

You can also view your approvals history on the Pending Approvals page by clicking on the action list menu in the top right corner of the screen, then selecting Approvals History.



Other ways to review transaction status (need security access)...

You may be able to view all expense reports for the university if you have any View roles. Access this screen using the following navigation **Classic Home tile > Main Menu > Travel and Expenses > Expense Report > View**. Searching by your desired criteria, including Report ID, employee name, and approval status.

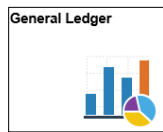
If you have access to Query Viewer, you can use the following queries to locate information:

- **UGA_TE_EXPENSE_REPORT_STATUS** (displays status of expense reports)
- **UGA_TE_DEPARTMENT_REPORT** (displays all travel transactions by department)

A list of useful links and queries can also be accessed directly in the Business Management Workcenter on the UGA Financials page in the UGA Financial Management System.

Budget Transactions (Journals or Transfers)

If you are the initiator...



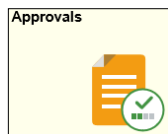
View your budget journals in the same place you created them using the following fluid navigation: **Employee Self-Service > UGA Financials homepage > General Ledger > Commitment Control > Enter Budget Journals**. Access the Find an Existing Value tab to search.

You can also see Budget journals from the Classic menu with the following navigation: **Classic Home > Main Menu > Commitment Control > Budget Journals > Enter Budget Journal**. Access the Find an Existing Value tab to search.

To see Budget Transfers navigate to **Classic Home > Main Menu > Commitment Control > Budget Journals > Enter Budget Transfer**. Access the Find an Existing Value tab to search.

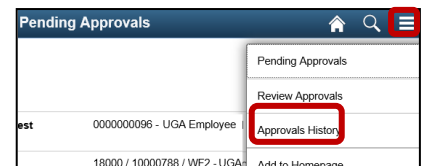
In the UGA Budget Management System, you can view your Pending amendments by going to **UGABUD > Forms > Amendments > Pending Amendment Review**. This will show all amendments that are currently being worked and have not been uploaded to the UGA Financial Management System. Once loaded, view in the Financial Management System as described above.

If you are one of the transaction approvers...



You can view all your pending budget amendment approvals by clicking on the Approvals tile, then viewing by type.

You can also view your approvals history on the Pending Approvals page by clicking on action list menu in the top right corner of the screen, then clicking on Approvals History.

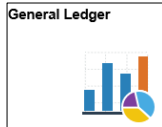


Amendments created in the UGA Budget Management System are imported into the UGA Financial Management System and approved there as described above.



Viewing Transaction Status

Other ways to review transaction status (need security access)...



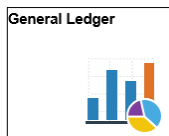
You may be able to view all the budget amendments created in the UGA Financial Management System by using the following Fluid navigation: **Employee Self Service > UGA Financials homepage > General Ledger > Commitment Control > Enter Budget Journals**. Access the Find an Existing Value tab to search.

In the UGA Budget Management System, you can view your Pending amendments using the following navigation: **UGABUD > Forms > Amendments > Pending Amendment Review**. This will show all amendments that are currently being worked and have not been uploaded to the UGA Financial Management System. Once loaded, view in the Financial Management System as described above.

A list of useful links and queries can also be accessed directly in the Business Management Workcenter on the UGA Financials page in the UGA Financial Management System.

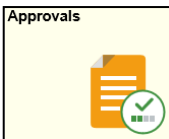
General Ledger Journals

If you are the initiator...



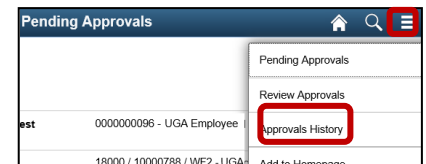
View your GL journals in the same place you created them by using the UGA Financials menu in Fluid, then select **Employee Self-Service > UGA Financials homepage > General Ledger > Journal Transactions > Journal Entries**. Access the Find an Existing Value tab to search.

If you are one of the transaction approvers...

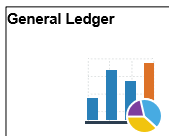


You can view all of your pending GL journal approvals by clicking on the Approvals tile, then viewing by type.

You can also view your approvals history on the Pending Approvals page by clicking on the action list menu in the top right corner of the screen, then clicking on Approvals History.



Other ways to review transaction status (need security access)...



You may be able to view GL journals if you have any View roles. Use the following navigation: **Employee Self Service > UGA Financials homepage > General Ledger > Journal Transactions > Journal Entries**. Access the Find an Existing Value tab to search.

If you have access to Query Viewer, you can use the following query for GL journal information:

- **UGA_GL_JOURNAL_ENTRY** (lists information for the selected journal)

A list of useful links and queries can also be accessed directly in the Business Management Workcenter on the UGA Financials page in the UGA Financial Management System.

Additional Information

- Tutorials on the information above can be found in the OneSource Training Library (training.onesource.uga.edu).
- You can find a list of all additional public queries with short descriptions on reports.uga.edu.