

Known Issue: KI9.2-73_EX – Creating Travel Authorization from a Template Causes Accounting Details to be Blank

POSTED: December 1, 2017

STATUS: Active

Following Release 5.30, when users attempt to create a travel authorization from a template, Accounting Details are not populated on all lines of the travel authorization.

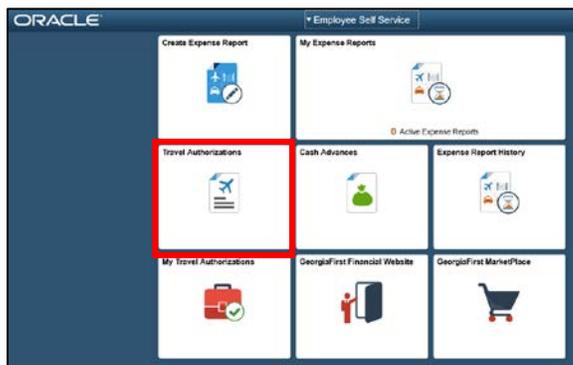
There are two ways to create a travel authorization from a template:

- Use the Quick Start menu
- Set the Default Creation Method for Travel Authorizations to Copy from a Template.

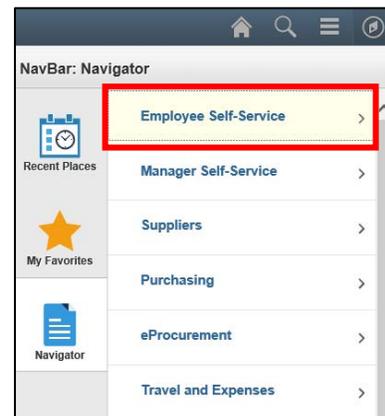
The steps that cause the issue to occur are outlined below:

Using the Quick Start Menu:

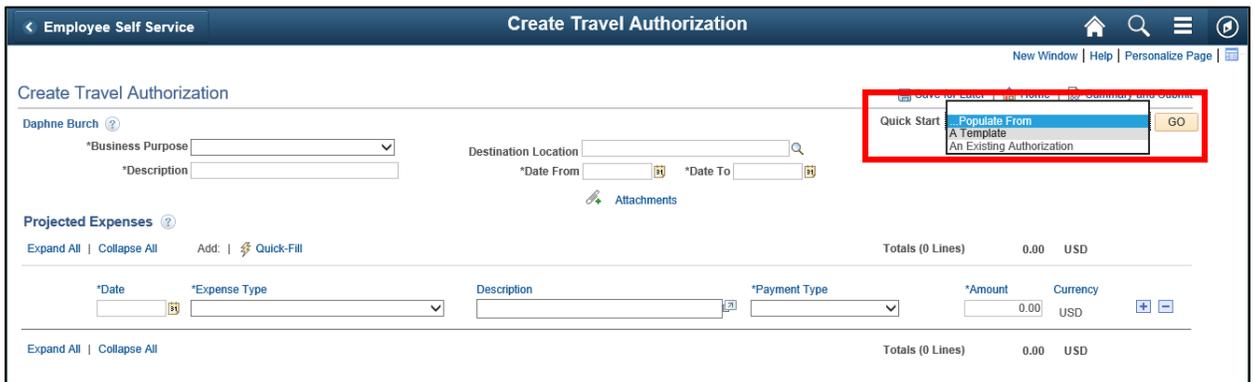
1. Select the Travel Authorizations tile from the Fluid Employee Self Service homepage OR use the Navigation Bar to select **Employee Self-Service > Travel and Expenses > Travel Authorizations > Create**.



OR



2. From the Quick Start Menu, select A Template and click GO.



Employee Self Service | Create Travel Authorization

Daphne Burch

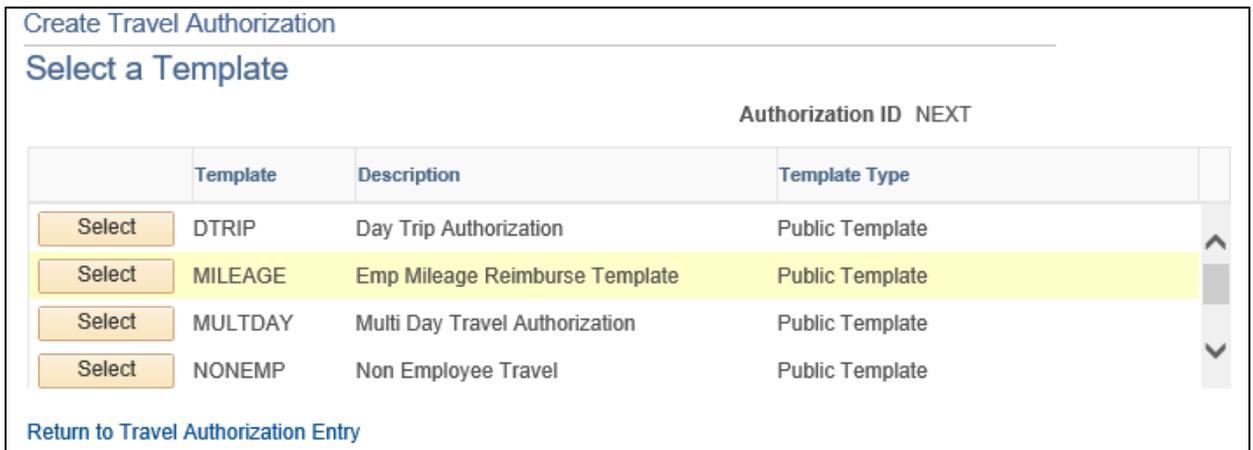
*Business Purpose: [Dropdown] | Destination Location: [Text] | *Date From: [Date] | *Date To: [Date]

Projectured Expenses

Totals (0 Lines) 0.00 USD

*Date: [Date] | *Expense Type: [Dropdown] | Description: [Text] | *Payment Type: [Dropdown] | *Amount: 0.00 USD

3. A list of templates will display. Select a template.



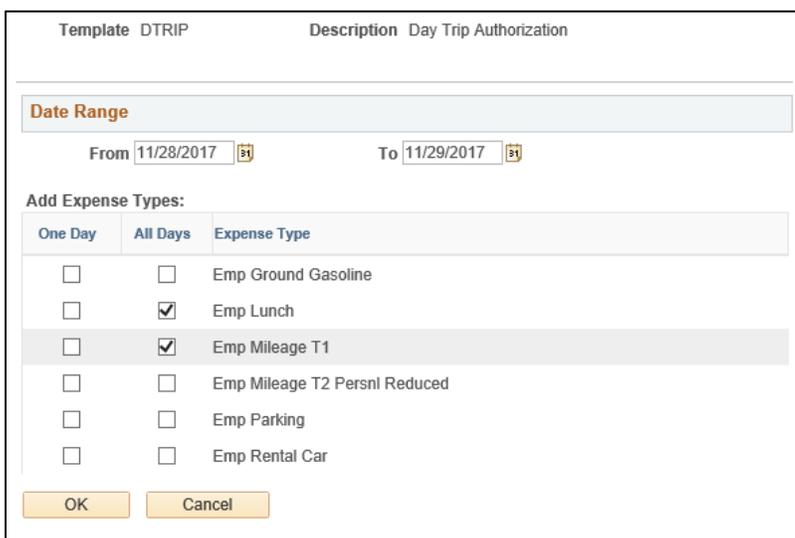
Create Travel Authorization | Select a Template

Authorization ID NEXT

	Template	Description	Template Type
Select	DTRIP	Day Trip Authorization	Public Template
Select	MILEAGE	Emp Mileage Reimburse Template	Public Template
Select	MULTDAY	Multi Day Travel Authorization	Public Template
Select	NONEMP	Non Employee Travel	Public Template

[Return to Travel Authorization Entry](#)

4. Enter a Date Range and choose Expense Type(s). When finished, click OK.



Template: DTRIP | Description: Day Trip Authorization

Date Range: From 11/28/2017 To 11/29/2017

Add Expense Types:

One Day	All Days	Expense Type
<input type="checkbox"/>	<input type="checkbox"/>	Emp Ground Gasoline
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Emp Lunch
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Emp Mileage T1
<input type="checkbox"/>	<input type="checkbox"/>	Emp Mileage T2 Persnl Reduced
<input type="checkbox"/>	<input type="checkbox"/>	Emp Parking
<input type="checkbox"/>	<input type="checkbox"/>	Emp Rental Car

OK | Cancel

- Note that the first line on the travel authorization is populated with Accounting Details, but the second line is not.

Create Travel Authorization Save for Later | Summary and Submit

Jaquetta Roddy Actions: ...Choose an Action GO

*Business Purpose: Destination Location:

*Description: *Date From: 11/28/2017 *Date To: 11/29/2017

Attachments

Projected Expenses Totals (4 Lines) 0.00 USD

Expand All | Collapse All Add: | Quick-Fill

*Date	*Expense Type	Description	*Payment Type	*Amount	Currency					
11/28/2017	Emp Lunch	<input type="text"/>	<input type="text"/>	0.00	USD					
*Billing Type: Internal *Location: <input type="text"/>										
Accounting Details										
Chartfields										
Amount	*GL Unit	Account	Alt Acct	Oper Unit	Fund	Dept	Program	Class	Bud Ref	Product
<input type="text"/>	33000	641130	<input type="text"/>	<input type="text"/>	10000	1046000	16200	11000	2018	<input type="text"/>
< >										
11/29/2017	Emp Lunch	<input type="text"/>	<input type="text"/>	0.00	USD					
*Billing Type: Internal *Location: <input type="text"/>										
Accounting Details										
Chartfields										
Amount	*GL Unit	Account	Fund	Dept	Program	Class	Bud Ref	Project		
<input type="text"/>	33000	<input type="text"/>								

Setting the Default Creation Method for Travel Authorizations to Copy from a Template:

Navigate to **Employee Self-Service > Travel and Expense Center > Profiles and Preferences > Review/Edit Profile**. The Default Creation Method is located on the User Defaults tab.

- Set Travel Authorization to Copy from a Template. This setting will automatically default Travel Authorization creation to Copy from a Template for every Travel Authorization you create.

Employee Self Service Celeste Wade

Employee Data | Organizational Data | **User Defaults** | Bank Accounts

Celeste Wade

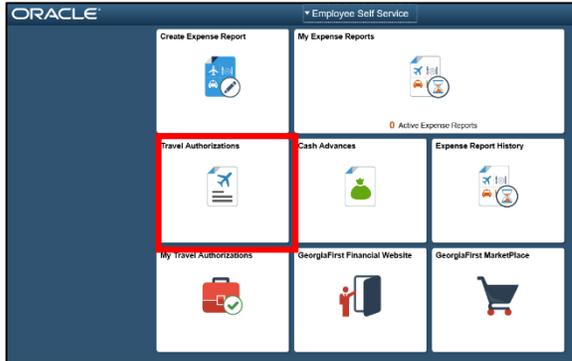
Default Creation Method

*Expense Report: Copy an Existing Report

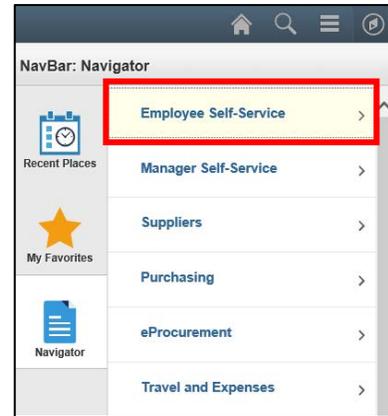
*Time Report: Open a Blank Report

*Travel Authorization: Copy From a Template

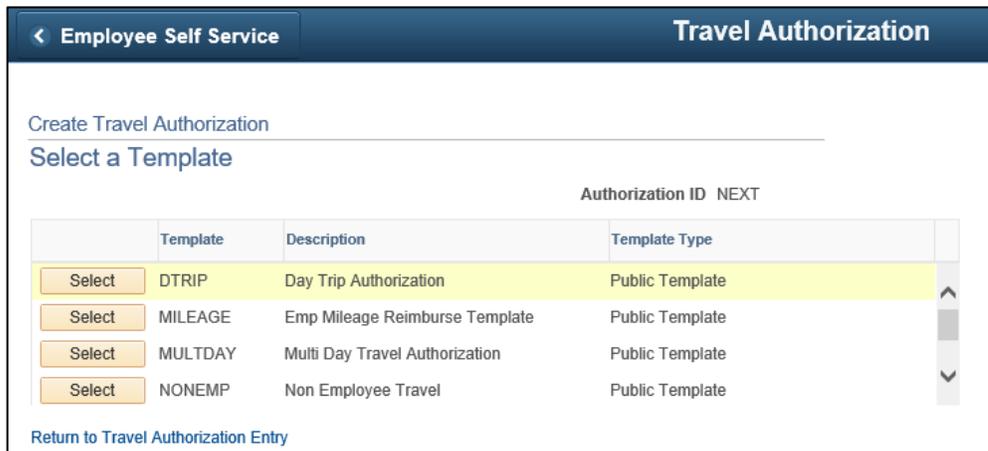
2. Select the Travel Authorizations tile from the Fluid Employee Self Service homepage OR use the Navigation Bar to select **Employee Self-Service > Travel and Expenses > Travel Authorizations > Create**.



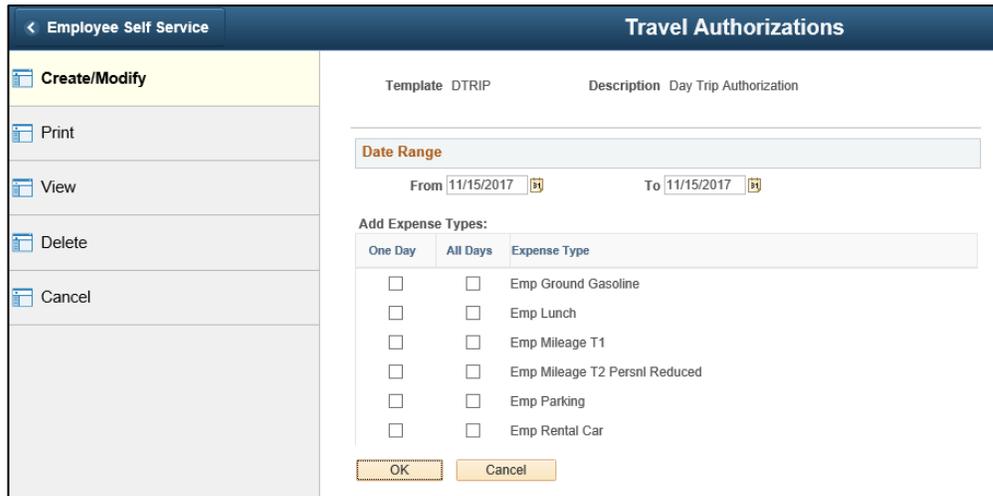
OR



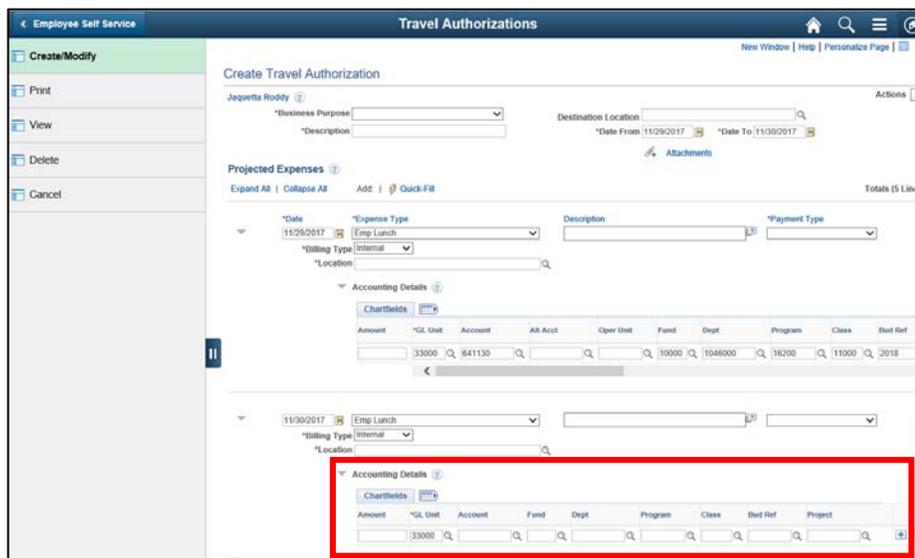
3. When you click the Add button, a list of templates will display. Select a Template.



4. Enter a Date Range and choose Expense Type(s).



- Once you enter this information and click OK, an Expense Report is created. The first line is populated with Accounting Details while the second line remains blank.



Amount	GL Unit	Account	Fund	Dept	Program	Class	Bal Ref
33000	641130		10000	1046000	16200	11000	2018

Functional Workaround:

Until an Oracle solution is provided, we recommend that users not create Travel Authorizations from a Template. In the event a template is used, you will need to manually enter the correct Accounting Details on each line.

Estimated Resolution:

A service request has been submitted to Oracle and a fix will be provided in a future release.

MORE INFORMATION AND SUPPORT: For business impact emergency issues, contact the ITS Helpdesk immediately at 706-583-2001 or 1-888-875-3697 (toll free within Georgia). For non-urgent issues, contact the ITS Helpdesk via the self-service support website at http://www.usg.edu/customer_services. (This service requires a user ID and password. E-mail helpdesk@usg.edu to obtain self-service login credentials.)

ADDITIONAL RESOURCES: For information about ITS maintenance schedules or Service Level Guidelines, please visit http://www.usg.edu/customer_services/service_level_guidelines. For USG services status, please visit <http://status.usg.edu>.