



### 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:

 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.

| DRACLE |                          | ▼ Employee Sell Service        |  |
|--------|--------------------------|--------------------------------|--|
|        | Create Expense Report    | My Expense Reports             |  |
|        | Travel Authonizations    | 0 Active 1<br>Cash Advances    | Expense Report<br>Expense Report History |
|        | Wy Travel Authorizations | CeorgiaFirst Financial Website | GeorgiaFirst MarketPlace                 |



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

OR



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| C Employee Self Service        | Create Tr            | avel Authorization | ♠ < <p>&lt; = </p>                         |
|--------------------------------|----------------------|--------------------|--|
|                                |                      |                    | New Window   Help   Personalize Page   📰 – |
| Create Travel Authorization    |                      |                    |  |
| Daphne Burch 👔                 |                      | G                  | Quick StartPopulate From GO                |
| *Business Purpose              | Destination Location | Q                  | An Existing Authorization                  |
| *Description                   | *Date From           | Date To            |  |
|                                |                      | Attachments        |  |
| Projected Expenses ②           |                      |                    |  |
| Expand All   Collapse All Add: | 🖗 Quick-Fill         | ٦                  | Totals (0 Lines) 0.00 USD                  |
| *Date *Expens                  | Type Description     | *Payment Type      | *Amount Currency                           |
|                                | ✓                    |                    | ▼ 0.00 USD + -                             |
| Expand All   Collapse All      |                      | 1                  | Totals (0 Lines) 0.00 USD                  |

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

| Create Trave    | I Authorization   | ۱                              |                       |   |
|-----------------|-------------------|--------------------------------|-----------------------|---|
| Select a T      | emplate           |                                | 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 Trave | I Authorization E | ntry                           |                       |   |

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

| Templat    | e DTRIP      | Description Day Trip Authorization |
|------------|--------------|------------------------------------|
| Date Rang  | е            |                                    |
| From       | n 11/28/201  | To 11/29/2017                      |
| Add Expens | e Types:     |                                    |
| One Day    | All Days     | Expense Type                       |
|            |              | Emp Ground Gasoline                |
|            | $\checkmark$ | Emp Lunch                          |
|            | $\checkmark$ | Emp Mileage T1                     |
|            |              | Emp Mileage T2 Persnl Reduced      |
|            |              | Emp Parking                        |
|            |              | Emp Rental Car                     |
| ОК         | Ca           | ncel                               |





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

| Create Travel Author      | rization                                   |                     |                                      | 🔚 Save              | for Later   🛃 Summary and Submit |
|---------------------------|--|---------------------|--------------------------------------|---------------------|----------------------------------|
| Jaquetta Roddy (?)        |  |                     |                                      | ActionsChoose an    | n Action 🗸 GO                    |
| *Business Purpo           | ose  | Destination Locatio | n Q                                  |                     |                                  |
| *Descript                 | ion  | *Date Fro           | m 11/28/2017 🛐 *Date To 11/29/2017 🛐 | ]                   |                                  |
|                           |  |                     | Attachments                          |                     |                                  |
| Projected Expenses @      | )  |                     |                                      |                     |                                  |
| Expand All   Collapse All | Add:   🖸 Quick-Fill                        |                     |                                      | Totals (4 Lines)    | 0.00 USD                         |
| *Date                     | *Expense Type                              | Description         | *Payment Ty                          | rpe *Amount         | Currency                         |
| 11/28/2017                | Emp Lunch                                  | ▼                   | 7                                    | <b>v</b>            | 0.00 USD + -                     |
| *Billing T                | ype Internal V                             |                     |                                      |                     |                                  |
| Loca                      |  | Q                   |                                      |                     |                                  |
|                           | <ul> <li>Accounting Details (?)</li> </ul> |                     |                                      |                     |                                  |
|                           | Chartfields                                |                     |                                      |                     |                                  |
|                           | Amount *GL Unit Account                    | Alt Acct Oper Unit  | Fund Dept Program                    | Class Bud Ref Produ | ıct                              |
|                           | 33000 Q 641130                             |                     | Q 10000 Q 1046000 Q 16200            | Q 11000 Q 2018 Q    |                                  |
|                           | <  |                     |                                      |                     | >                                |
|                           |  |                     |                                      |                     |                                  |
|                           |  |                     |                                      |                     |                                  |
| 11/29/2017                | Emp Lunch                                  | ~                   | [7]                                  | ~                   | 0.00 USD + -                     |
| *Billing T                | ype Internal V                             |                     |                                      |                     |                                  |
| Loda                      |  | 4                   |                                      |                     |                                  |
|                           | Accounting Details                         |                     |                                      |                     |                                  |
|                           | Chartfields                                |                     |                                      |                     |                                  |
|                           | Amount *GL Unit Account                    | Fund Dept           | Program Class Bud Ref P              | roject              |                                  |
|                           | 33000 Q                                    | Q Q Q               |                                      | Q 🛨 🖃               |                                  |
|                           |  |                     |                                      |                     |                                  |

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.

1. 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<br>*Time Report Open a Blank Report<br>*Travel Authorization Copy From a Template |              |





 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.

|        |                          |                                |                          | _  |               | A Q   |     |
|--------|--------------------------|--------------------------------|--------------------------|----|---------------|---|-----|
| ORACLE |                          | Employee Self Service          |                          |    | NavBar: Navig | gator   |     |
|        | Create Expense Report    | My Expense Reports             |                          |    |               | and the second second   |     |
|        |                          | Ĩ                              |                          |    | $\odot$       | Employee Self-Service   | > C |
|        |                          | 0 Active E                     | xpense Reports           |    | Recent Places | Manager Self-Service  | >   |
|        | Travel Authorizations    | Cash Advances                  | Expense Report History   |    |               | and the second se |     |
|        | <b>X</b>                 | <b>i</b>                       |                          |    | My Eavorites  | Suppliers   | >   |
|        |                          |                                |                          |    |               | Purchasing  | >   |
|        | My Travel Authorizations | GeorgiaFirst Financial Website | GeorgiaFirst MarketPlace |    |               | eProcurement  |     |
|        |                          | <b>Ý</b>                       |                          | OR | Navigator     |   |     |
|        |                          | •••                            |                          |    |               | Travel and Expenses   | >   |

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

| C Employe       | ee Self Servi      | ce                             | Travel Authoriz       | ation  |
|-----------------|--------------------|--------------------------------|-----------------------|--------|
| Create Trave    | Authorizatio       | n                              |                       |        |
| Select a T      | emplate            |                                |                       |        |
|                 |                    |                                | 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       | $\sim$ |
| Return to Trave | el Authorization E | Entry                          |                       |        |

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



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| K Employee Self Service | Travel Authorizations                             |  |  |  |  |
|-------------------------|---|--|--|--|--|
| Create/Modify           | Template DTRIP Description Day Trip Authorization |  |  |  |  |
| 🛅 Print                 | Date Range  |  |  |  |  |
| T View                  | From 11/15/2017 B                                 |  |  |  |  |
|                         | Add Expense Types:                                |  |  |  |  |
| Tolete                  | One Day All Days Expense Type                     |  |  |  |  |
| Canad                   | Emp Ground Gasoline                               |  |  |  |  |
| Cancer                  | Emp Lunch   |  |  |  |  |
|                         | Emp Mileage T1                                    |  |  |  |  |
|                         | Emp Mileage T2 Persnl Reduced                     |  |  |  |  |
|                         | Emp Parking                                       |  |  |  |  |
|                         | Emp Rental Car                                    |  |  |  |  |
|                         | OK Cancel   |  |  |  |  |

5. 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.

| C Employee Self Service | Travel Authorizations 🛛 🏫 🔍 🗮 🧭                                     |
|-------------------------|---|
| Create/Modify           | New Window   Help   Personalize Page    Create Travel Authorization |
| Print                   | Jeguetta Roddy 👔 Actions [  |
| View                    | *Business Purpose   |
| Delete                  | Attachments   |
| Cancel                  | Expand All   Collapse All Add:   @ Quick-Fill Totals (5 Line        |
|                         | Tober Type Type Type Type Type Type Type Type                       |
|                         |   |
|                         |   |

### **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 <a href="http://www.usg.edu/customer\_services">http://www.usg.edu/customer\_services</a>. (This service requires a user ID and password. E-mail <a href="http://www.usg.edu/customer\_service">helpdesk@usg.edu/customer\_services</a>. (This service requires a user ID and password. E-mail <a href="http://www.usg.edu/customer\_service">helpdesk@usg.edu/customer\_service</a> (This service requires a user ID and password. E-mail <a href="http://www.usg.edu/customer\_service">helpdesk@usg.edu/customer\_service</a> (This service requires a user ID and password. E-mail <a href="http://www.usg.edu/customer\_service">helpdesk@usg.edu</a> to obtain self-service login credentials.)

**ADDITIONAL RESOURCES**: For information about ITS maintenance schedules or Service Level Guidelines, please visit <u>http://www.usg.edu/customer\_services/service\_level\_guidelines</u>. For USG services status, please visit <u>http://status.usg.edu</u>.