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INTRODUCTION

The Financial Systems team provides functional support of various systems and to system end-users across campus. In addition, it provides support to Card Services including Dolphin One Card and Guest cardholders. In an effort to effectively track, maintain and resolve incidents in a timely manner, issues and inquiries should be reported via email or ticket form as described in this document.

PURPOSE

This guide provides general instructions on how to create work orders and describes the types of platforms available, their purpose, and the appropriate method to use when submitting a work order to the Financial Systems team.

SCOPE

This guide covers the following three sections:

1) The first part of this guide provides detailed instructions on how to create a ticket via email. This section pertains to system end-users who require functional support for any of the supported systems from the list provided.

2) The second part of this guide provides detailed instructions on how to request help and request a refund via ticket form. This section pertains to Dolphin One Card and Guest cardholders who are experiencing issues with their cards or who would like to request a refund.

3) The third part of this guide provides supplementary information in the form of Frequently Asked Questions (FAQ's).

OVERVIEW

Financials Systems uses both form and email based ticketing platform that enables system end-users and cardholders to submit inquiries, report issues, and track open and closed tickets. In order to properly open a ticket within Financial Systems, understanding which platform to use and what to include in your ticket inquiry assists in quicker responses and resolutions.

Financial Systems

Financial Systems uses an email based platform that is available for end-users to request system support. For inquires and to report an issue, please email financialsystems@csuci.edu. Once the email is submitted, it will generate a ticket through the Team Dynamix ticketing system where you can track the progress of your request.

The list below provides information on the systems and modules we currently support, including examples of the types of issues we resolve.

- **CI Financials / CFS**
    - AP (Accounts Payable)
    - AR/BI (Accounts Receivable/Billing)
    - AM (Asset Management)
    - PO (Purchasing)
    - Online Requisitions
    - GL (General Ledger)
- **Finance Data Warehouse**
    - Reporting Issues

- **Blackboard Transact & Reporting**
    - New/existing user setup
    - Reporting Issues
- **Hyperion**
    - Reporting Issues
- **Student Financials (SF)**
    - Student Account Issues
    - Student Fee Issues
- **Labor Cost Distribution (LCD)**
    - Payroll data Issues
    - Monthly LCD processing

When making a request to Financial Systems, please make sure to include the following information to assist the financial systems team in resolving your ticket:

- The system the issue occurred in
- Navigation to the page/error
- Student ID if applicable
- Screenshot of error or run control of process
- Date/time information
- Steps taken to resolve prior to submitting ticket

Please reference the example provided below when submitting your ticket.

From ▾ jonathan.freking@csuci.edu

To... **A** ⊞ Financial Systems;

Cc...

Subject **B** SF - Refund's not posting

Hello Financial Systems,

C MAIN MENU > STUDENT FINANCIALS > TUITION AND FEES > TUITION CALCULATION

D This student (XXXXXXX1) is showing enrollment of 16 units but no tuition fees are calculating. I tried to calculate their tuition **E** today at 1PM but it didn't work. **F** I manually calculated other students and they seem to work fine. Here is the message from the Tuition calc page from the student that didn't work.

G Tuition Calculation

ID

Academic Information   Display Student's Accounts

Academic Details   View All   First 1 of 2 Last

Academic Career Postbaccalaureate

Student Tuition Calculation Details   Find | View All   First 1 of 1 Last

Academic Institution Channel Islands   Business Unit Channel Islands

Term Fall 2018

Primary Program Credential

☐ Override Billing

☐ Override Initial

Tuition Residency 0.000

Override Tuition Group

☑ Tuition Calc

Calculate Tuition and Fees

Message

Unable to calculate Tuition Group or evaluate Fee Trigger / Waiver. (14815,26)

Unable to calculate Tuition Group or evaluate Fee Trigger / Waiver because the student is not on the Select Student View (SEL_STDNORES_VW). Check to see if Student (ID) exists on the view for given key fields.

OK   Cancel

Display Tuition and Fees   Display Errors / Warnings

Save   Return to Search   Notify   Refresh

Please advise,

Jonathan Freking
DBFA Systems Analyst
Division of Business and Financial Affairs

#	Field / Owner	Description	Values
A.	Domain name	Email to submit ticket requests	financial.systems@csuci.edu
B.	Subject	Use Acronym for system in subject	Ex: SF = Student Financials
C.	Navigation	Provide the navigation to the page where the error/issue occurred	Ex: CashNet: Find Transactions > Transaction Number: 123456
D.	EMPLID	Provide the student ID number if applicable.	123456789
E.	Date/Time	Provide a date or time that the error/issue occurred	---
F.	Troubleshoot	Provide any information regarding attempt at resolving the issue prior to ticket submission	"Calculated other students and they seem to work fine, student with error persists"
G.	Screenshot	Provide a screenshot of the issue and any other pertaining information	Embedded image in email

Card Services

Card Services uses a form based ticketing system that allows Dolphin One Card and Guest cardholders to request help with their card or request a refund. The examples provided below illustrate the predefined fields for each form and will help with submitting your ticket. For more information, or to access the forms, please visit the Card Services website.

To report an issue, please use the Card Services Request for Help form:

Issue

+ Show Help   −

Use this request form to ask questions and/or report issues.

Requestor * ❓ 👤

Josue Magana (Staff)   ✕ ▾

CSUCI Affiliation * ❓

Business and Financial Affairs   ✕ ▾

Brief Description of Issue(s) and/or Question(s) * ❓

Unable to make deposits on my Dolphin One Card

Additional Information Regarding Issue(s) and/or Question(s) (Optional) ❓

I'm unable to make a deposit on my Dolphin One Card using the DOCK Station located in the Library. The error message I receive is: "User not found in the system."

Upload Additional Supporting Documentation (Optional) ❓

Browse...   No file chosen

Request

Field	Description	Values
Requestor	This is an individual that is listed as the person asking for service detailed within the ticket.	Your name should default as the requestor
CSUCI Affiliation	Select the affiliation that best describes the requester's relationship with the university.	Ex: Business and Financial Affairs for staff; _Student for student requests.
Description	A short description to explain the nature of a ticket.	Ex: "Unable to make deposits" or "Receiving an error message when processing a transaction."
Additional Information	The full details of a ticket, including any appropriate circumstances or supplementary information that may aid in resolving it.	Provide details regarding the issue, or inquiry

Field	Description	Values
Attachments	File attachments associated with the ticket.	Attach supporting documentation such as screenshots of the page or error message.

To request a refund, please use the [Card Services Request Refund form](#):

Refund

+ Show Help   − Hide Help

> Use this service to request a refund

Cardholder Name * ❓

Josue Magana

Requestor same as Cardholder *
◉ Yes   ○ No

CSUCI Affiliation * ❓

Business and Financial Affairs

Date of Transaction ❓

1/8/2019

Brief Description of Your Refund Request(s) * ❓

Requesting a balance refund

Refund Request Amount *

$50.00

Cardholder Phone Number *

805-437-8593

Cardholder Email Address * ❓

josue.magana@csuci.edu

Type of Card *

- (•) Dolphin One Card
- (○) Guest Card

Card Number * ❓

| 000000000 |

Refund Type * ❓

- ☑ Dolphin/Dining cash balance
- ☐ Pharos Copying/Printing
- ☐ Meal Plans
- ☐ Transfer funds between Dolphin and Dining Cash
- ☐ Other- Duplicate and transaction disputes

Dolphin/Dining Refund * ❓

Only the balance of Dolphin and Dining cash deposits are refundable. Balances below $25.00 will not be refunded. All refunds are subject to a $25.00 processing fee. Please respond whether or not you are OK with this processing fee.

- ☑ Yes. I acknowledge how refunds work.

Additional Information * ❓

The full details of a ticket, including any appropriate circumstances or supplementary information that may aid in resolving it.

| (Enter a description or reason why your card should be refunded. Use the attachment field to add screen shots or error messages and other supporting content.) |

Additional Information is required.

Attachments ❓

| Browse... | No file chosen |

Field	Description	Values
Cardholder Name	Enter the full name of card holder	Enter your name if you are the cardholder. If you are not, enter the name of the cardholder.
Requestor same as Cardholder	Click "Yes" if you are the requestor. If you are requesting a refund behalf of a student, click "No" and enter the student's name.	Yes/No
Date of Transaction	Select the date when your transaction happened.	Ex: 01/08/2019
Brief Description	Describe your refund request	Requesting a balance refund.
Refund Request Amount	Enter the amount of the refund being requested.	Ex: $50.00
Cardholder Phone Number	Provide cardholder's contact number	Ex: (805) 437-8593
Cardholder Email Address	Provide cardholder's email address	Ex: Josue.magana@csuci.edu
Type of Card	Enter the type of card you are requesting a refund for.	Ex: Dolphin One Card

Field	Description	Values
Card Number	Enter the card number located in front of your Dolphin or Guest Card	Ex: 000607659
Refund Type	Select the type of refund you are requesting	Ex: Dolphin/Dining cash balance
Acknowledgement for Dolphin/Dining Refund	This checkbox "only" pertains to balance refund requests. Please read and acknowledge the processing fee.	Click "Yes"
Additional Information	The full details of a ticket, including any appropriate circumstances or supplementary information that may aid in resolving it.	Provide details regarding the issue, or inquiry
Attachments	File attachments associated with the ticket.	Attach supporting documentation such as screenshots of the page or error message.

FAQ

1. **Why are we not using a form based platform for submitting a financial systems ticket?**

    The reason we chose to use an email platform is to make submitting issues/questions more convenient for end-users that are constantly working in these systems. Some of the conveniences include submitting a ticket with embedded information like the example above in **Financial Systems.** Within the form based platform, users would be required to save an attachment and attach their screenshot to the form itself. The email platform eliminates that option and attempts to save our users some time and effort. Once the email is submitted, a ticket will be generated in Financial Systems with the imaged included embedded within the Team Dynamix ticketing application.

2. **Why do we need to include the system in the subject field?**

    The reason we ask for you to include the system in the subject field is to help us organize more efficiently within the ticketing application. We chose the format of allowing users to submit an email to create a ticket, which means that when a ticket is submitted, the ticket is created as unassigned and sits in a queue. Financial System will then have to manually assign the tickets to the right technician. By placing the system name within the subject line, it will allow for anyone who is assigning the ticket to the corresponding technician in the ticketing application a quicker turnaround time and assist in organization.

3. **What are the various system acronyms to use in the subject line?**

    Below is a list of the System Acronyms to be used when opening a ticket:

    SF – Student Financials

    LCD – Labor Cost Distribution

    HYP – Hyperion

    STZ – StarRez

    T2 – T2

    BBTS – Blackboard Transact & Reporting

    CFS – Common Financial System

    FDW – Finance Data Warehouse

    PHRS – Pharos System

    Please note that for all CashNet ticket inquiries, you must email the CashNet inbox at Cashnet@csuci.edu.