New Node ID Configuration in Web UFS

Please note: that this instruction is for new NODE IDs only. If you are setting up a new node ID in Web UFS, for a new unit, or a unit already in web UFS moving from an existing node to a new node ID, you will need to follow the instructions below:

What is a node ID? Web UFS requires units to be set up and organized with a node ID. A node ID (think data bases) is linked to a primary unit number and can contain many units and/or subunits. Units in each node ID will share data related to vendors, customers, cashiers, where applicable. Web UFS users must request access to each node via the SoUnified system, and can have access to many node IDs, as required for UFS data entry or validation.

**If you need to request a new node ID, please complete the Web UFS New Node request, under the NorAm Identity & Access Request > Finance section of the SoUnified service request.
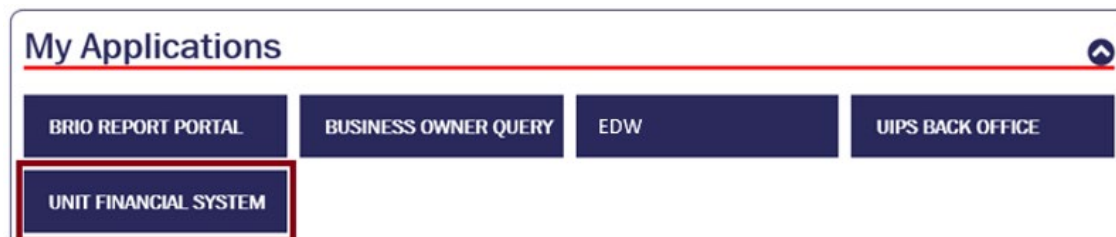
Accessing MySodexo

If you are using a Sodexo computer, you will probably have the Sodexo home page as the default home page. If not, add to favorites, the web address for the home page is: https://us.sodexo.com/employee-portal. Select the MySodexo link.
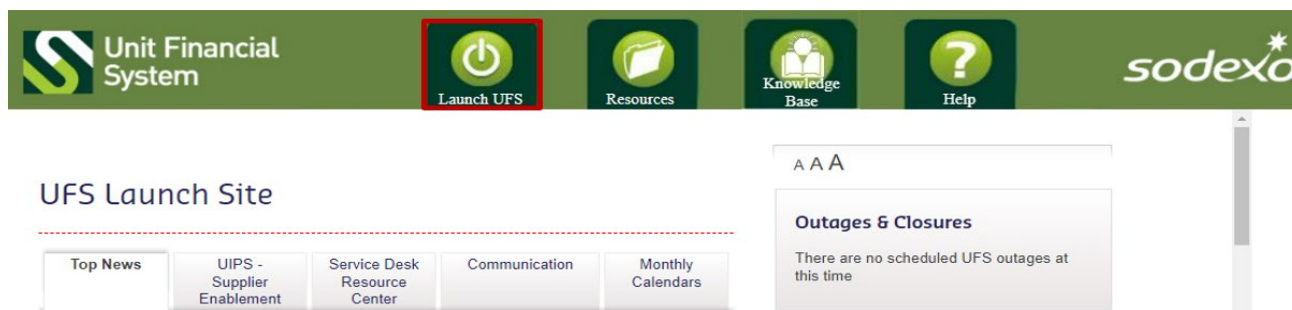

ACCESSING WEB UFS

In MySodexo, select Unit Financial System (applications order may vary).

The UFS Launch Site screen will appear. Click the "Launch UFS" button to enter Web UFS.

Select the "Setup" option tab and then "System Configuration" from the drop-down menu. You will not be allowed to enter any of the modules on this screen until you complete the System Configuration.

Please work with Segment Support or your Finance Director to determine the Week-End Date, Week Number, and Period. No other fields should be changed in this section.

Note: You may receive an error message that you are not authorized to perform this action. Once the week-end date is determined, click "Save". This should accept the changes. Close the UFS window, relaunch and if you see your user information at the top of the screen the node is configured. If this doesn't work, you will need to contact the UFS Service Desk.

You only have one chance to make changes, so check your data carefully to ensure accuracy before saving. If you find you made an error after saving, you will need to contact the Help Desk for assistance.

Once you save your edits, you will be required to exit the Unit Financial System and log back in. When doing so, please exit completely out of MySodexo. Log back into MySodexo and then access the Unit Financial System. You should now be able to access the Maintenance section of UFS. Select the **Units** option on the drop down menu. Click the Add button.

A message will pop up. Please note – as the message states, you may not add a cost center or unit number that already exists in UFS. Click OK to remove message and proceed to the next step. UFS will alert you if you attempt to save a unit that already exists in another node ID. Contact unitfinancialsystemsadministration.noram@sodexo.com with questions or for access support.
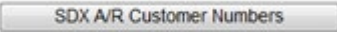

The Unit Add screen will appear.

Enter Unit data for all empty fields. (Campus sample shown, fields may vary slightly by business line). Update defaulted information such as Unit Type, Client Vending, Transmittal Type and Statistics Required as applicable.
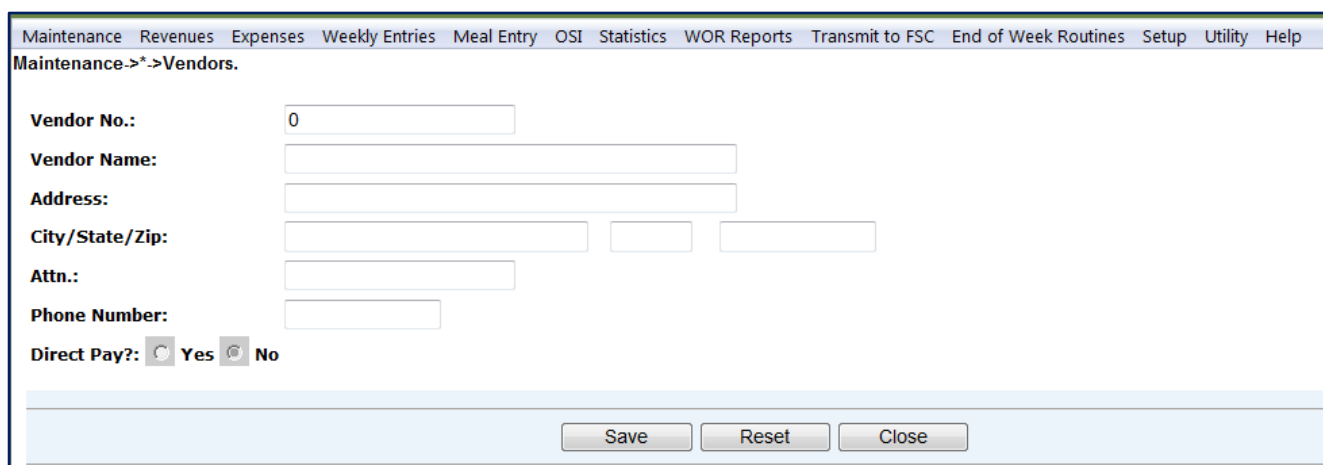
You must click the SDX A/R Customer Numbers button [SDX A/R Customer Numbers] and add the A/R customer number in order to set up your billing customers for this unit. You can obtain this A/R number from Accounts Receivable Department through a SoFinance ticket request.

After you complete the Unit Maintenance information, you will need to enter your vendors. Select "Maintenance" and then "Vendors" from the drop-down menu.

Maintenance	Revenues	Expenses	Weekly Entries	Meal Entry	OSI	Statistics	WOR Reports	Transmit to FSC	End of Week Routines	Setup	Utility	SAP Fiori	Help	Knowledge Base
Units														
Customers														
Vendors														
Tax Rates														

Maintenance Revenues Expenses Weekly Entries Meal Entry OSI Statistics WOR Reports Transmit to FSC End of Week Routines Setup Utility SAP Fiori Help Knowledge Base

Maintenance->*->Vendors

Vendor No.	Vendor Name	Phone Number	Address	City	State	Direct Pay?
0 Records Found	Show Filters		<< < 1 of 84 > >>			
		Add	Edit	Copy	Remove	

Click the Add button. The Vendor Maintenance screen will appear.

Maintenance Revenues Expenses Weekly Entries Meal Entry OSI Statistics WOR Reports Transmit to FSC End of Week Routines Setup Utility Help

Maintenance->*->Vendors.

Vendor No.: 0

Vendor Name:

Address:

City/State/Zip:

Attn.:

Phone Number:

Direct Pay?: ○ Yes ⦿ No

[Save] [Reset] [Close]

Enter your vendor information. You can obtain the vendor number by contacting the AP Department through SoFinance by email APInvoiceProcessing.Noram@sodexo.com.

**Important** - you will not need to add an electronic or "Direct Pay" vendor number as they will be added to UFS automatically. When suppliers are enabled to the electronic process vendor numbers are uploaded directly into UFS as invoices are entered into our system.

You will now need to enter your tax information. Select "Maintenance" and then "Tax Rates" from the drop-down menu: **Note: US units only** - Canada taxes will load in the nightly master data load after new node configuration is completed and be available the following day.
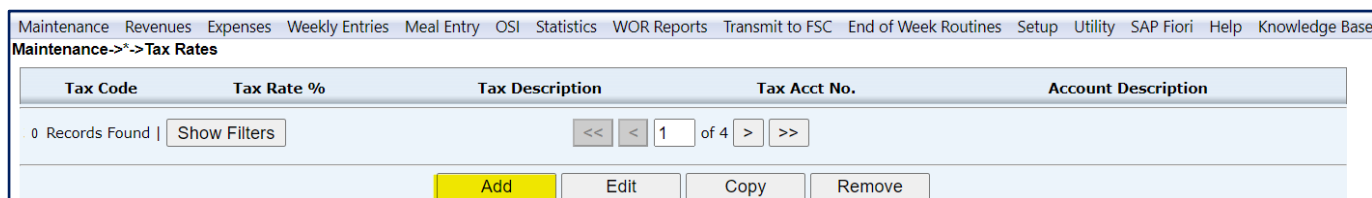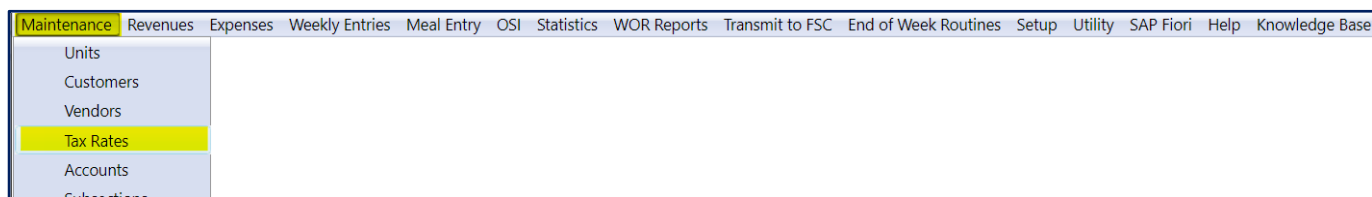
Click the "Add" button on the bottom of the page and the Tax Rates Maintenance screen will appear. Enter your tax rate information.
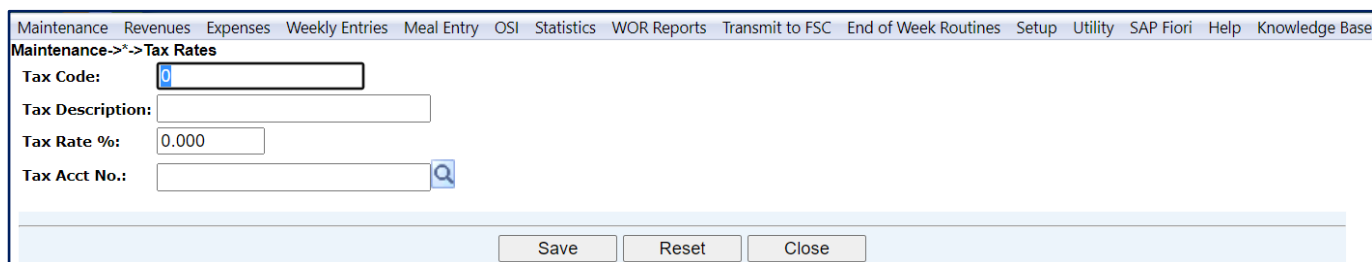
If you need assistance in determining the tax account number work with Segment Support through SoFinance or your Finance Director.

You are now ready to enter your weekly financial data.

Please Note: Other unit setup data, cashiers, worksheets, templates, etc. must also be added, as required. History will not be available in the new node but will begin building as you enter data and transmit. If your unit is not new and existed in another node ID, you will still be able to access historical data through the previous node ID, or through your Brio Report Portal.

Training on how to use the Unit Financial System, including more information on adding setup data to all modules is available. Refer to the Web UFS Training page on Sodexo_Net for self-paced training available on Ingenium as well as short tutorials for a quick refresher on a specific module.

For UFS technical support:
- Submit a help ticket by clicking Generic Incident on Self Service Mobile
- You may also email for support at Helpdeskufssupport.Noram@sodexo.com, or
- If **urgent**, please call the UFS Service Desk at 1-888-667-9111, options. 1, 2, 1.

For General UFS Questions
- Please use SoFinance to request support from the UFS Team.