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# 1. Task Approver Reassignment:

User mailed to return the workpaper to her.  
Told user that the current task owner has the capability to change the task approver since it is under her my task.  
Emailed also the current task owner Karen Rossman to confirm if she can see the workpaper in her task. Also informed her that she has the capability to change the task approver.

Waiting for their response.

(or)

Asked her if the new Approver is added as Lead Auditor in the Engagement and she confirmed that she had processed it.  
Processed backend reassignment and told her that her request has been completed.  
She confirmed ticket closure

Informed user that the Lead Auditor or the Audit manager has the capability to reassign the task approver.

Waiting for user's response

2. Adding of users in Team Contacts 2962039

Created the account of Kamara King in MS and assigned both of them in the Guest auditor ORP so their names will appear in the list of team contacts.  
Advised user to wait for the system update before adding them in the Audit team of his engagement.  
Waiting for his action.response.

Using my P&G account, added the two users in Guest Auditor ORP under Level 1 Organization.  
IMed Grace that she can add them in the team contacts after the system update (6:30 PM Cincinnati Time)

Checked and seen that Sebastian does not have MS Access yet.  
Created his account and granted him Guest Auditor Access.  
Informed Sofia that Sebastian's access will reflect after system update.  
Closing ticket.

adding lead auditor:

Send user how to add lead auditor from Manage audit form he can closeck the magnifying glass in the lead auditor side.  
waiting for user response.

# 3. Change Action title in metrics

Monthly KPI review with ESPs [ACTION - 115061]

Did desktop sharing and found out that it was triggered.  
Told him that the best workaround is to close that old action plan and recreate the correct one.  
He said that he will just do it.

# 4. Cancel the task

Radkiewicz, Joanna \_ 3324229

Please be informed that Audit Manager/Final approver (Gaby Castro) has the capability to cancel the task by selecting Cancel Task in the action drop down list then selecting the Submit button, then after he submits it he will need to Approve it in order to complete the cancellation process.

Create Task(s) 3334774

Create Task(s) 3334772

Create Task(s) 3331029

Create Task(s) 3331021

# 5. Change task name

Advised user that it is better to cancel the task and then create a new one because once the task has been created the name cannot be changed anymore.

Informed user that the Audit Manager/Final approver has the capability to cancel the task by selecting Cancel Task in the action drop down list then selecting the Submit button, and then after he submits it he will need to approve it in order to complete the cancellation process.

User  is requested to change the task name

I would not get access to Metric Stream. There is an error shown as below meaning “the website could not be visited”. While user has no issue to get access to other P&G intranet or internet.

# 6. MS Access \_ 3320903

Upon importing user in the system, his account is not available.

Please help import Edgar Gomez(CV4464) in MS system. Thank you.

Using my account gave user access in MS by following the OP9 and OP4.

# 7. Issue Remediation

Issue Owner asked assistance on how to assign Action Plan Owner.

Asked him to share his screen. Assisted him on how to create an Action Plan. Asked user if he will be the one to close/complete the action plan and he confirmed. After Action Plan creation, asked him to trigger the action and submit the form.  
He said that he wants to avoid his action plan owners to return to him for concerns so he will keep the issues with him and let the Action Plan Owners close their designated APs.  
Offered him our job aid on how to close an Issue and he was thankful.  
Though he wants to keep the issues to himself.  
No further concerns raised.

1. 3324063 -

Is the user requesting to upload the file to the issue?

I am confused on his request. The user should have the ability to upload the document himself.

# 8. Closing Early Remediated Issues\_ 2897822

# Terry forwarded Tj's question on how to close an early remediated issues from a SOX CSA+ Engagement.

Emailed Tj with the steps on how to close an early remediated issues.  
Told her to share the steps to the issue owner/issue approver. Or contact us directly if further assistance is needed.  
Waiting for Tj's response.

Told her that all Issues in MS system will undergo the same process of remediation.  
If the Issue from audit is said to be remediated, "REMEDIATED" or "ACCELERATED REMEDIATION" is to be included in the first part of the Issue Title.  
  
She asked once the Audit report has been published, is there something she needs to do in the Audit?  
Told her that closure of Audit should be made. And she should make sure all of the forms were closed (WPs, Checklslists, APS or Audit Reports

# 9. Planned overdue:

Emailed user the below explanation:

Overdue - If the today’s date is past the Due Date of the Issue

            Planned Overdue - If the Estimated Completion Date is past the Due Date and today’s date isn’t past the Due Date (otherwise, the status will be In-progress)

As per checking, each Issue’s Estimated Completion Date was changed to a later Date so this is why the status of the issue became ‘Planned Overdue’

User replied and said that the inside of the Issue Form, the Due Date is not the same as the Report shows. The ECD is the same with its Due Date, the sites do not change this date to one day later. The days are off one day and it makes the issues 'Planned Overdue'  
  
**Hi Level 2 Support Team,  
Good day!**As per checking the system, the Issues that appear to be Planned Overdue has a day gap between ECD and Due Date. But when opening up the Issue form, they are the same. Can you please check the Report and the Issue Form as well?  Thank you

# 10. Can not create issue in the Issue tab.

Asked user what particular Control Objective he wanted to create an issue. Informed user that when creating an issue he should choose a specific CO where he will create the issue and make sure that he is in the CSA Survey Details page.

Hi GiselleTherese,

Good day!

Please be informed that what particular Control Objective you wanted to create an issue. when creating an issue you should choose a specific CO where you will create the issue and make sure that you should be available in the CSA Survey Details page.

Regards,

Sambasiva Rao

Level 1 MetricStream support /Incident Management Support

Please your help to update the following Auditable Entity Reference ID on CSA Coordinator field in MS?

|  |  |  |  |
| --- | --- | --- | --- |
|  |  | **CSA Coordinator** | |
| **Auditable Entity Reference ID** | **Auditable Entity** | Old | New |
| AE-102795 | Procure-to-Pay - Newcastle Service Center Accounts Payable - Accounts Payable | Nancy Reodique; Dang Ruiz | Mendoza, ChristineJoy; Lu, Unna |
| AE-102486 | Procure-to-Pay - Manila Service Center Accounts Payable - Accounts Payable | Nancy Reodique; Dang Ruiz | Mendoza, ChristineJoy; Lu, Unna |
| AE-100982 | Procure-to-Pay - Asia & IMEA - Procurement - Organization General Controls | Nancy Reodique; Dang Ruiz | Mendoza, ChristineJoy; Lu, Unna |
| AE-100983 | Procure-to-Pay - Asia & IMEA - Procurement - Purchasing [Procurement] | Nancy Reodique; Dang Ruiz | Mendoza, ChristineJoy; Lu, Unna |

User requested to update the following AE Reference ID on CSA coordinator filed in MS.

# 11. Uploading file and close issue:

Delete tempo and clear cached   
closed all IE's and open a new IE  
advice user that the capacity of uploading a file must be 100mb only   
if the file is over 100mb s/he must divide the file so that the system will accept it

Did desktop sharing and asssisted her on uploading of file by deleting tempo first and let her try it again.  
Successfully uploaded the file.

Messaged him in lync and asked the size of his file.  
He said that it is 113mb.  
Informed him that the system only supports 100mb per file and 50files per CSA.

chatted Rui and asked about the file size of the excel file.  
said that it is 91 MB.  
advised to divide the file into several parts (maximum file size to be uploaded is 5mb)  
ticket can be closed.

Renamed the file but still got the error.  
Asked Stan about this if the zip file is supported and she said:  
"make sure that file doesn't have any dots  
“.”  
the only "." allowed is before the extentions  
so if the file have name report.now.too.zip  
this would not work  
ask to rename to report\_now\_too.zip

only one "." dot in the name allowed  
and tell to remove all special characters from the name as well  
including none-US characters ( if this is a spanish user )  
letter might look like US but can be typed in different language  
if this doesn't work, let user name the file with a date, like 2014-1-30.zip  
this will work garantee."  
  
Forwarded it to User. Waiting for response.

Did desktop sharing and found out that it is still on a manage issue. Gave her the steps of issue remediation.  
1. Manage Issue : Creating of action plan then Trigger Action  
2. Implement Action : Closing of Action Plan.  
3. Monitor Issue : Routing of Issue to Issue Approver  
4. Close with Approval : Issue will be on the Approver my tasks ready for issue closure.

# 12. How to get issue id:

Did desktop sharing and assisted her on how to get the Issue id by openning the Issue and getting the id after the issue title (i.e ISSUE-10001) and navigated to Related To tab to check the Subprocess name.  
- She asked if there's a way to view it on a excel file.  
- Exported the issue list report but upon checking there is no Issue IDs on it, only Subprocess.  
- Tried to go to Issue Status Report but only 1 issue shown up.  
- Contacted Terry to ask if there's a way a user can get the Issue IDs on a report.  
- He said on the issue status report.  
- Told him that, there is only 1 report showing up but in issue list report there are 5-6 issues.  
- Terry said that should be equal.  
- let Melody check it if the issues on her Issue list report is equal to her issue status report. Unfortunately she didn't respond get offline.  
  
Note: I emailed her to check it. Waiting for her response.

**or**

Told him that he can search the Issue ID in the Issues Tab > Reports section > Issue Status report.  
He said he did that but he cannot find the issue.  
Asked for the ID and he gave '105160'. Told him to use 'Issue - 105160' in the filter and adjust the FY filter.  
User was able to find the issue.

# 13. How to close the issue:

On the issues tab there is a section for training and how to close issues.

Audit Title: China marketing follow up Engagement

# 14. Issue load: 3240951, 3317229

3240951 as per the this ticket before creating we need to take the approval of CSA coordinator

emailed user ask for the correct org and AE, issue source and risk them.   
waiting for user response.

User chatted and asked for clarification about the email. Told him that he is being asked whether the Issues should be tagged to the mentioned Organization and AE and he said Yes.  
  
Issue Source Type : Assessment   
Source : TEST-109945  
Risk Theme : Controls & Monitoring - Production/Warehouse  
  
Emailed Lindelani Magidi for approval but she is OOO  
Forwarded to Jerilynn Waymire and waiting for approval.

emailed user ask for correct issue priority and financial impact  
waitng for user response

user response non major  
emaileed Kiko for approval

Kiko approved.  
Using my P&G account, created the issue.  
ISSUE - 112855  
  
Emailed user.  
Waiting for user's response.

**Hi Kiko,**

**Good day!**

We would like to get your approval in the below request.

*If this does not satisfactorily answer your question or if you have clarifications please let us know. Your response will aid us close or work further on the ticket we have created for you*

**or**

**User is requesting issue load from attach file**

Emailed Dave Dunoye.d for the Archer access approval to Kris.

 Emailed Dave Dunoye.d for the Archer access approval to Kris. Waiting for his approval.

Adding of users in Team Contacts 2962039

Created the account of Kamara King in MS and assigned both of them in the Guest auditor ORP so their names will appear in the list of team contacts.  
Advised user to wait for the system update before adding them in the Audit team of his engagement.  
Waiting for his action.response.

Using my P&G account, added the two users in Guest Auditor ORP under Level 1 Organization.  
IMed Grace that she can add them in the team contacts after the system update (6:30 PM Cincinnati Time)

Checked and seen that Sebastian does not have MS Access yet.  
Created his account and granted him Guest Auditor Access.  
Informed Sofia that Sebastian's access will reflect after system update.  
Closing ticket.

# 15. adding lead auditor:

Send user how to add lead auditor from Manage audit form he can closeck the magnifying glass in the lead auditor side.  
waiting for user response.

1. Audit Score Data Import

**3. Issue Status Query:**

User reported why is the status of the Issue's 112089, 112090, 112091 & 112092 are "planned overdue" while the due date is still August.

Informed user that the this concern is still on level 2. See related main ticket.

**4. AE Inquiry: (3309250)**

User reported that AE (Information Security - itAccess - Application Management) he previously requested is showing inactive and the OU, BU & SU are incorrect

Thank you Rachele, will wait for your confirmation.

**NOTE: Organization mapping will be completed since user's Org is included in CH Changes. Keep this ticket open and inform user once CH changes is done.**

**5. CSA Issues Concerns: (**3250218**)**

User asked to [1] delete the duplicated Issues below and [2] Reassign Issue Owner to Claudethemegan.

Told him that we need alignment from the BCF/CSA Coordinator regarding his requests.  
He emailed Rafael Carballo, BCF, and waiting for approval.  
  
NOTE: Once approved, kindly create a separate ticket for cancellation of the below Issues.

Please be informed that the issue owner can change the Estimated Completion Date so that the status can also change. Kindly refer to the meaning below. If the status didnt change after changing the ECD, please let us know. Thank you.

I checked all the below issues were cancelled

**6. CSA Reports: ()**

Auditor is asking for a full copy of Assessment Status Report with the below filters:

Please see attached file and confirm if it is what you needed. Thank you.

*If this does not satisfactorily answer your question or if you have clarifications please let us know. Your response will aid us close or work further on the ticket we have created for you*

Emailed to user the filtered report.

FY : 1213, 1314, 1415,   
Country : Argentina

When i supplied the ASR report this morning, the file included all of the fiscal years. Now, activate the filters in Excel and filter out to the requested conditions. save and send it to the end user

**7. Issue Count for Indonesia (3240673)**

CSA Coordinator asked if there are 28 Issues under Indonesia.

Thank you for contacting MetricStream Application Support Team,

As per checking, there are 28 Issues under the Organizations where you are the assigned CSA Coordinator for Indonesia (country). Please see below screenshot for furhter details. Kindly let us know if you need anything else. Thank you.

Went to Issue Risk Report and filtered SMO as OU and Indonesia as Country.  
Found 28 Issues under user's ownership.  
Emailed this to user and waiting for his response.

**8. Issue Remediation (3240646):**  **Overdue Issues Metric Stream**

Issue Owner asked how to remediate an Issue.

**Mail:**

Kindly be noted that if you want to remediate an Issue in the system, you need to access the Issue from your My Tasks list. We are sharing the steps a well on how to properly close the Issue/s in the system.

Please let us know if you encounter errors. Thank you.

**MetricStream Link:**[**http://egrc.pg.com**](https://webmail.pg.com/owa/redir.aspx?SURL=zozCbLYlbUP7XJwSBgJt8IMZZCFBn7Ix1dtvY52pMWSEYBKQ5XPTCGgAdAB0AHAAOgAvAC8AZQBnAHIAYwAuAHAAZwAuAGMAbwBtAA..&URL=http%3a%2f%2fegrc.pg.com)

**Please navigate your “My Tasks” section/tab and look for the below:**

**From L3:**

L3: Now the issue data is back in the form. Can you ask the user to work on this. This can not be closed as it requires an action for the next step[Monitor issue stage]. Without an action we cannot go to next stage or close. Please ask user for the input.

Emailed user. Waiting for her response.

Currently user is on OOO until Monday  9th May

User has closed above mentioned CSA. As we need the CSA  again, he is asking now an extract of this CSA..

 He tried to download from MetricStream directly, however this appears not to work well.

**9. CSA Report Request (3240558)**

User is asking if there is still a report from last year for him to download. He is the CSA Performer.

Please help regarding users concern. He need a copy of CSAs from assessment status report for FY14/15. Thank you.

attached you will find requested report

Informed user that he can use the Assessment Status Report or the Assessment Details Report.

Please help regarding users concern. He need a copy of CSAs from assessment status report for FY14/15. Thank you.

emailed user attached file.

Please be informed that you can download it in MS system. Click Compliance Tab > under report, you can try Assessment Details Report or Assessment Status Report. Kindly note that the Assessment Status Report is down until March 7, but I already asked our Level 2 for a copy of CSA for FY14/15. We will send it to you once we received it. Thank you.

**10. 3321909**

User confirmed as he was downloaded the file successfully

Informed user that he can use the Assessment Status Report or the Assessment Details Report.

Through LYNC

**11. Issue Status Report (**3240312**)**

User asked for the copy of the issues status report of all FY available in the system.

**12. Request to transfer Action plan to Ownership (3319959)**

Willah requesting to transfer the action plan to Edgar Aranda due to Cristine Lacson left from the company.

**13. 3319078 Read Access**

Thomas requesting to modify his account  to run his issue report.

I emailed to Karla for approving the Thamos request.

Waiting for Karla's approval.

Karla approved give Thomas level 1 BCF  
using my P&G account process user request  
  
emailed user his level 1 bcf access will take effect after sytem restart 6:30pm est

waiting for user confirmation

User not able to Access the records.

 we fxed the issue as the users infolet tab was empty.

Emailed user to check that he will be able to access the records now.

Waiting for user confirmation.

User replied and said that he still cannot see any reoport.  
Seen on the attached screenshot of user, he is accessing the report on Reports Tab.  
Emailed him the steps on how to view/ export Issue Status Report.  
Waiting for his response.

**14. CSA Action plan visibility in MS (3319072)**

I assigned BCF role to Olga. Emailed user and waiting for response.

**15. Organization/ORP Changers (3202283)**

Follow up Ian

Updated by: JP  
Ian replied and said that he already responded to this ticket. Please see attached file and related ticket.

**16. Change GMVP and Moving of Orgs (3202289**)

**17. BCF ORP Changes (3202474)**

**18.** 3207378 Wrong sub unit and BCF

User reported that the attach file have Wrong sub unit and BCF

**19. 3210655**

**20.** 3240312 \_ Config-Reports

Issue Status Report

* **21.** 3240646 \_ Issue Remediation\_ Config-Reports

Emailed above thing to user and Waiting for her response.  
Currently user is on OOO until Monday  9th May

**22. 3320947 priority tomorrow Stephen is available at 9SA 12:30 IST**

**Subject:** Assistance Requested: Reassigning Issue Owners

Dear Team,

I am writing to request your assistance with the reassigning issue owners.

Currently the below issues are under the ownership of the Issue Approver (Stephen Cornes):

**Hi Nicole,**

**Good day!**

We would like to inform that we have asked Stephen for his availability to do desktop sharing so that we could check his end and further discuss his concerns.

Thanks & Regards

**Manoj RM**

Software Engineer- P&G, Sogeti India

**Capgemini | Bangalore | India**

Ext: 8042151, Mobile: 7353383344

**From:** Naidoo, Nicole  
**Sent:** Friday, April 29, 2016 7:20 AM  
**To:** egrcsupport, Ion  
**Subject:** Assistance Requested: Reassigning Issue Owners

 Hi Stephen,

Good day!

We would like to ask for your availability to do desktop sharing so that we can check your end and to further discuss your concerns.

Thanks & Regards

**Manoj RM**

Software Engineer- P&G, Sogeti India

**Capgemini | Bangalore | India**

Ext: 8042151, Mobile: 7353383344

**23. Audit Score Data Import** 3315839

**24. Testing Center Access 3316918**

**25.** MS Access

**25. Issue Creation Request 3317049**

**26. 3317087 D&T Issue Query**

**27. 3317090 D&T Auditor Access \_ Karla**

**28.** 3317164 Issue Owner Reassignment

Ida Ocampo, CSA Coordinator, asked to reassign IO for the below Issues to user.  
ISSUE - 110622  
ISSUE - 110621  
ISSUE – 110620

Chatted Garry Carr for desktop sharing and waiting for his availability.

Did dekstop sharing and assisted Gary on how to reassign Issue Owner role to user. Asked him to access the Issue from his My Tasks list.

Emailed Ida and waiting for her response.

Followed up Ida

29. Issue owner reassignment 3321222

User shared the Issue Id and New Issue owner for reassign,   
I checked the Organization if it is active (CE SMO Warsaw). New user has not having MS Access as well so I import him and provide MS access.  
User is the assigned CSA

05.05.2016

**22. 3320947 priority tomorrow Stephen is available at 9SA 12:30 IST**

**Subject:** Assistance Requested: Reassigning Issue Owners

**30.** 3320003 Additional member in Team

**31. 3320025 Unable to save Action Plan**

User not able to save action plan to close issue completion in the Metricstream

We noticed that  user has accessed the issue from issues tab not from the My Tasks tab.

Emailed the user to Access the issue from his My tasks because the system is task base.

Waiting for user response.

**32. 3320147** Need Access to MS \_ Access/Security Issue

Please be informed that we already corrected your infoletgroup account in Metric stream. Please use below link for training.  
  
http://communities.pg.com/CM/GlobalInternalAudit/CSAPortal/SitePages/Home.aspx

**33.** 3321886 Change Issue Owner

I checked the Organization if it is active (Bhiwadi Plant). Arvind Grover has not having MS Access as well so I import him and provide MS access.  
User is the assigned CSA Coordinator, so I proceeded his request. and Emailed him.  
Waiting for his response.

**34.** 3320055 Issue and CSA Query

**35. 3320854** Create AE

User is requesting to create AE as per attached file.

36. 3320892 BCF level 1 Access

37. Error in Cannot Reassigning Issue Owner 3317421

38. 3235966

39. User is requesting to provide her an access to archer. \_ Config-Groups/Roles

40. 3316808

41. 3316871

42. 3317204

43. 3317229

44. 3319988

45. 3320130

46. 3320130 CSA issue management in Metric Stream

47.

**09.05.2016**

**1.** [3240646](javascript:$pbC('3240646|383|169||')) OOO Issue Remediation

2. 3309250 AE Inquiry

3. 3315839

Still no Update from Tien on this issue.

No response from end user

**4.** 3319052

and i just click on my tasks but however accidentally click on audits tab which is next to my Task

and suddenly the screen show nothing in my task

therefore immediately we seek help from you

as we are in the middle of the meeting to re assign the task to another performer

to complete her area

as this is relating to OSB so there are performers from different functional involve

User did the Screen sharing i opened his missed the tasks them the user to continue on task and assigned to task performer