



Grants Coordinator Forum

January 25, 2017

Agenda

- OneSource Project Overview
- Grants Accomplishments
- Next Steps – Spring 2017
- How can you become involved?
- Q&A

What is One Source?

- Multi-year business transformation project
- Replace many legacy administrative systems and associated business processes
- Next Generation Finance and Human Resource administrative systems and processes: Oracle PeopleSoft 9.2

Why undertake OneSource Project?

- **Ageing Systems** - Core systems were designed decades ago with the purpose of satisfying the core processing and reporting requirements of the institution
- **Unsustainable** - Modifying these core systems when possible and implementing ad-hoc vendor provided systems to augment current system capabilities is no longer a sustainable practice or an efficient approach
- **UGA is ready** - Collegiate Project Services survey, interviews, and focus group sessions clearly identified that Colleges and Units need updated and efficient functionality, improved data access, and reporting

UGA Strategic Plan 2020

- **Strategic Direction VI**
- ***Improving and Maintaining Facilities and Infrastructure to Provide Excellence in Instruction, Research and Service***
- To achieve excellence in instruction, research, and service requires an investment in the underlying infrastructure of the campus that allows faculty, staff, and students to perform their functions with the greatest efficiency.
- **Strategic Priority:** Provide for technology infrastructure to meet the increased needs of instruction, research, service, and administration by replacing the legacy computing systems with modern systems having an emphasis on information systems that will improve the above functions.
- **Benchmark:** Stages of completion of the new system(s).
- **Goal:** A suite of modern computing systems that will meet the increased needs of instruction, research, service and administration by 2020.

Anticipated Benefits

- **Integration of data** across areas so that each department will have the information it requires when needed
- **Streamlined business processes** to enable faculty and staff to work and plan more effectively
- **Reporting tools** that will improve data access and UGA's ability to make data-driven decisions
- **Collaboration** with the University System of Georgia's "oneusg" project to provide standardized human resources business practices and IT platforms across institutions
- **Industry standards and best practices** identification and adoption for current and future information technology architecture
- **Improved data privacy and security**

Who will be affected?

- **All faculty and staff**

through Payroll and Human Resources processes and self-service features

- **All offices**

through Financial & HR reporting, processes, and systems

UGA OneSource Roadmap

As of 1/1/2017

 Go Live

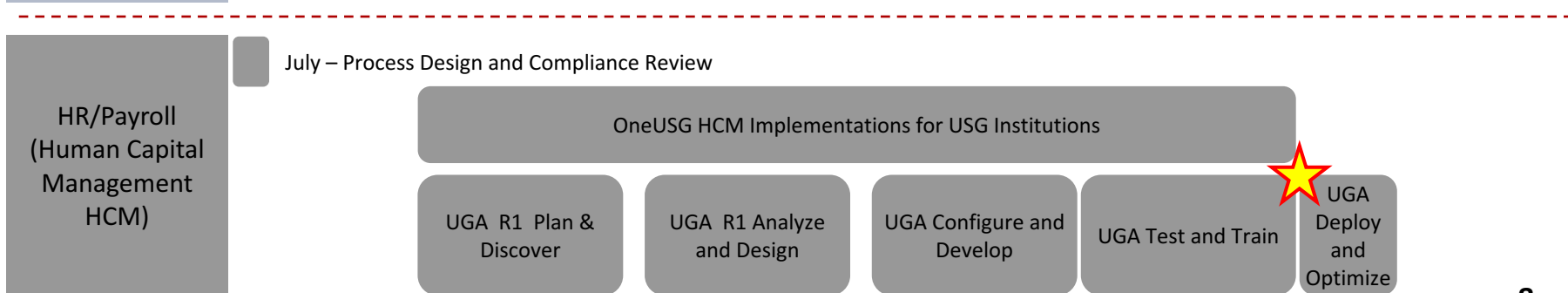
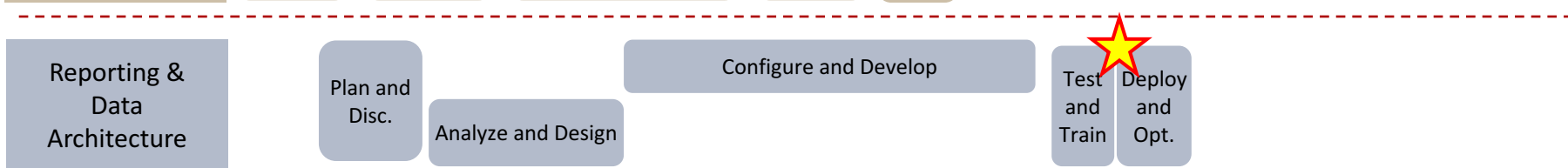
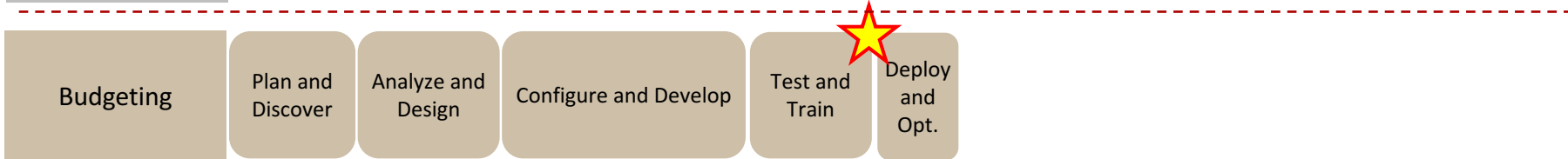


Chart Fields Overview

Current

- Fund (2)
- Function (2)
- Operation (1)
- Activity (1)
- Department (3)
- n/a
- Project (3)
- Total **12** digits
- Object Code (5)

New

- Fund (5)
- Function (5)
- Class (5)
- n/a
- Department (8)
- Operating Unit (3) *(if needed)*
- Project (15) *(if needed)*
- Total **41** digits
- Account Code (6)
- Budget Reference (4)

SpeedType 10

UGA Account to PeopleSoft Chart String

Account number 1011GH168126-71400 or **10-11-GH168-126-71400** is broken down below and could become USG PeopleSoft **chart string 10500-11100-11000-11012000-1260000000-714100**

UGA Account Number Segments			USG Chart Field		
10	Resident Instruction	Fund	10500	Tuition	Fund
11	Instruction	Function	11100	General Academic Instruction	Function
G	General Operations	Operation	11000	General Operations	Class
H	Instruction	Activity	N/A		
168	Chemistry Department	Department Number	11012000	Chemistry	Dept ID
126	Curriculum Dev/Organic Chem	Project Number	1260000000	Curriculum Dev/Organic Chem	Project ID
71400	Supplies & Materials	Object Code	714100	Supplies & Materials Expense	Account

CHEM021

Project

- The **Project** ChartField is generally defined to support identification of transactions associated with a capital project or grant. It provides for additional functionality unique to projects accounting (project life, defined period, defined activities, etc.) as defined in the PeopleSoft Project Costing module. The project ChartField can be used for both sponsored and non-sponsored purposes.
- *Defined by UGA know as Project Indicator by USG.
Recommendation is a 15-digit alpha/numeric chart field.*

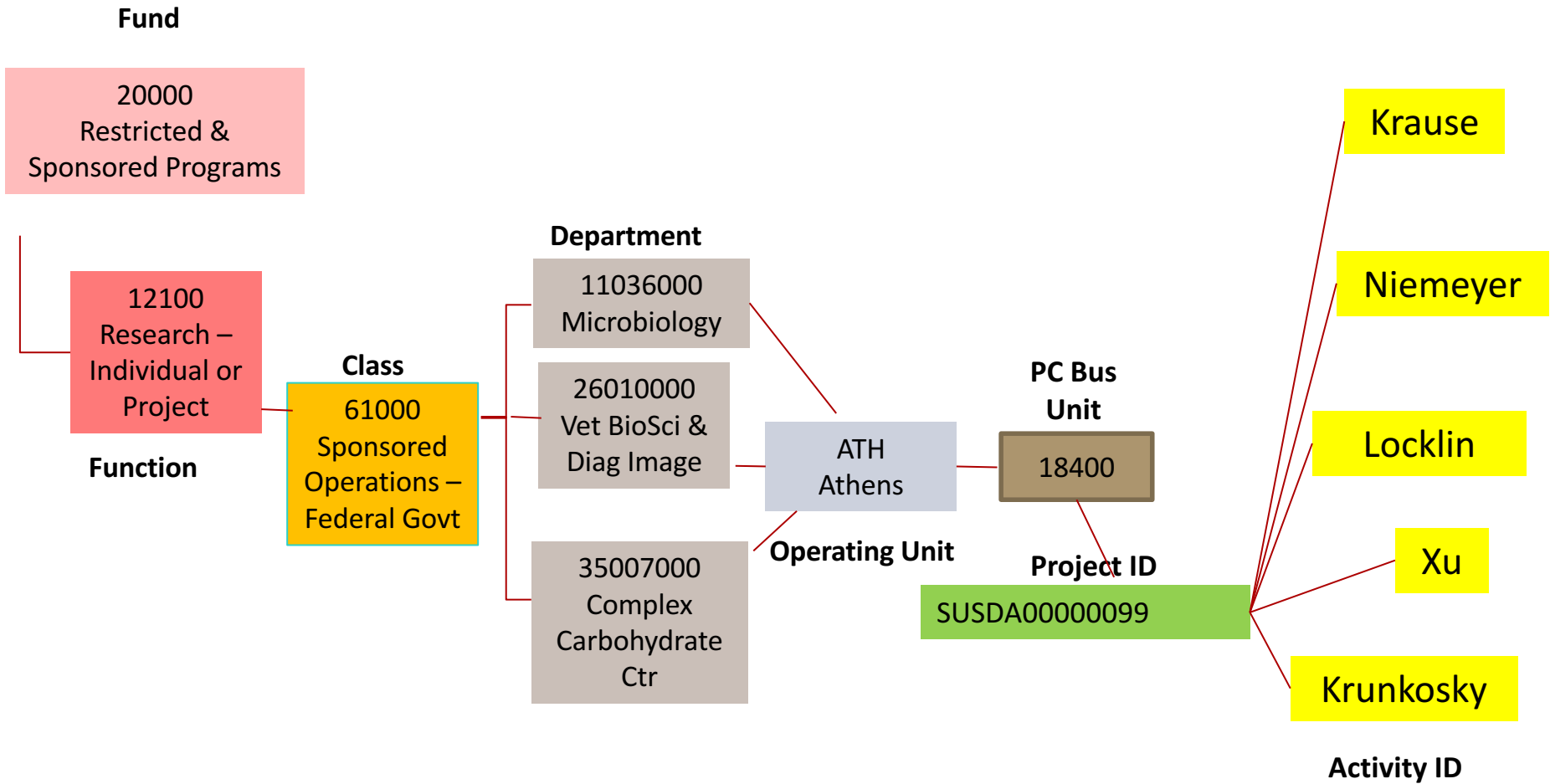
Project

- There are two **Project** specific ChartFields that are unique to the PeopleSoft Project costing module. Those are:
 - PC Business Unit – An operational subset of an organization to organize project activity independently of the constraints of the standard accounting procedures for the financial posting and reporting of the organization.
 - Activity ID – Identifies activities and specific tasks that make up a project.
- *Defined by UGA. The length of these fields is to be determined; they can be alpha/numeric: up to five digits for PC Business Unit and up to 15 digits for Activity ID.*

Project

- Project ID consideration for grants is 15 characters-
- Ex. S USDA 00000099
 - S= Sponsored Project
 - USDA= Sponsor abbreviation
 - 00000099= Click's 8 digit assigned number
 - Last 2-digits will be used as needed

Sponsored Funds Account Example



eResearch Portal and PeopleSoft Integration



- *Create Proposals*
- *Route Documents*
- *Track Awards*
- *Prepare Renewals*
- *Setup Projects*
- *Track Grant Activity*
- *Financial Management*
- *Financial Data for Reporting*

Proposal data from Grants in the eResearch Portal will flow to PeopleSoft Grants via custom interface.?

Discovery /Grants scope

- Discovery Sessions explored the way we currently manage grants:
 - This topic was subdivided based on specific tasks such as billing, accounts receivable, contracts, etc.
 - PeopleSoft Grants Suite will interface with other modules that manage above tasks
 - Discovery sessions were held for eResearch Portal (Click)
- Fit Gap Sessions explored:
 - How our new system would facilitate our requirements
 - How we should adapt our business processes

Grants Team Members

- Nancy Perkins, Microbiology
- Jenna Jones, Sponsored Projects Administration
- MaryAnn Deom, Sponsored Projects Administration
- Gail Chester, Sponsored Projects Administration
- Emily Schattler, Ecology
- Carey Paul, College of Veterinary Medicine
- Gary Rachel, Office of Research IT
- Aye Htun, Genetics
- Savannah Whaley, Sponsored Projects Administration
- LeGail Tudor, Biochemistry
- Karen Cruz, Center for International Trade and Security
- Michael McGough, College of Family and Consumer Science
- Vivian Hermitano, College of Education
- Jane Magrino, Complex Carbohydrate Research Center
- Jennifer Oates, College of Agriculture & Environmental Science Business Office
- Brian Freese, Carl Vinson Institute of Government

OneSource Grants Leads

- Beth Pease- Consultant with Sierra-Cedar: Beth.Pease@uga.edu
- Ken Dover, UGA: kdover@uga.edu
- Marsha O'Connor, UGA: marshao@uga.edu
- Shawn Hill, UGA: shawnh@uga.edu

Next Steps – Spring 2017

We are currently beginning prototyping and business process design

- Utilize what has been learned from Discovery and Fit Gap to configure PeopleSoft to best meet UGA's needs
- Our business processes will be reshaped to better accommodate our new direction (Ex. grant reporting, management of sub awards, access to better detail, closed grant information)

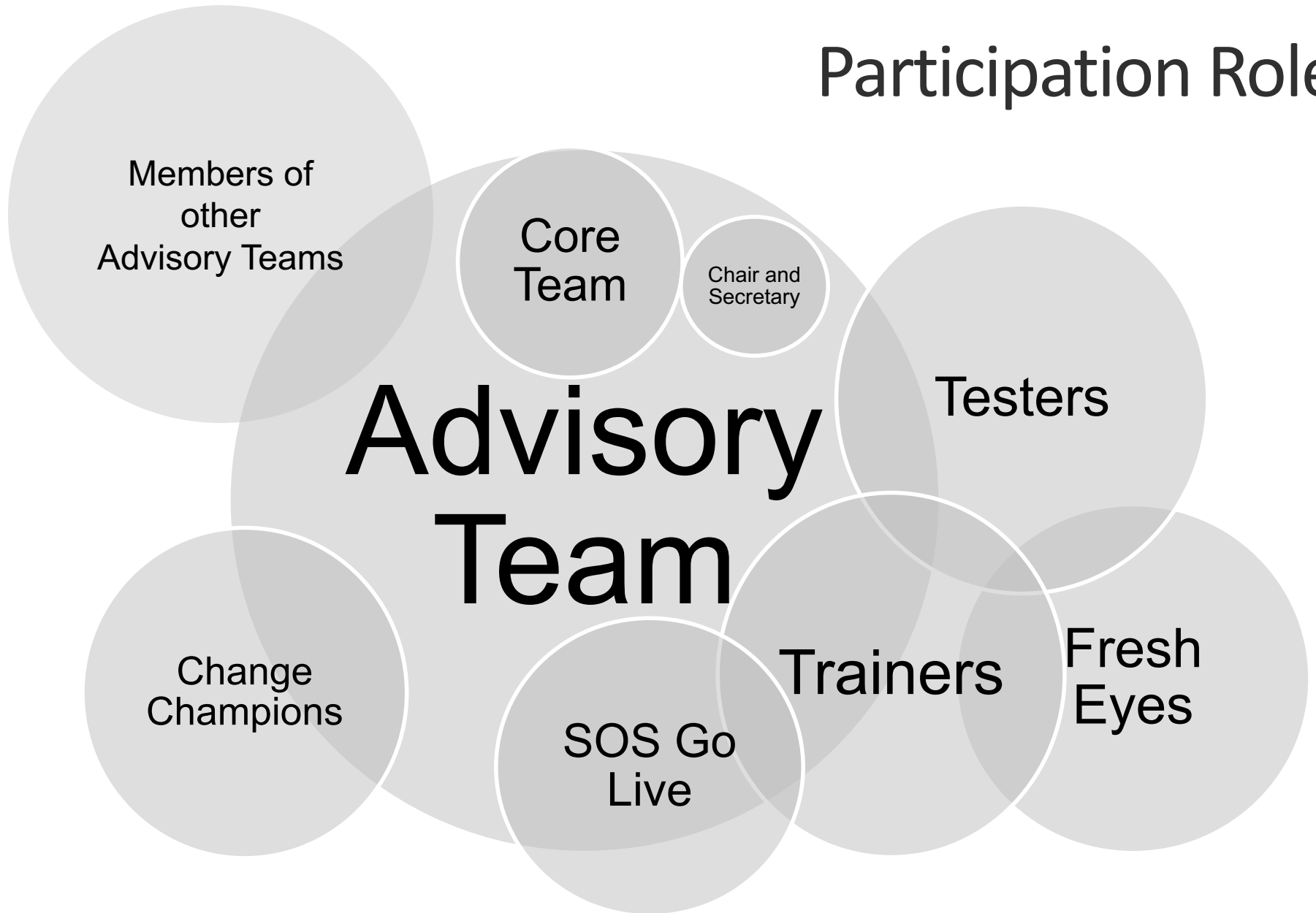
Next Steps – Spring 2017

- We will review initial configuration and map our business processes using PeopleSoft functionality
- Make changes to the prototype and business process design as needed
- Begin testing and refining based on what we experience

How can I prepare for success?

- **Educate** – Website, Brochure, Videos
- **Communicate** – Regular updates via listserv, campus groups
- **Participate** - Discuss within your organization. Volunteer.
- ***Your input and questions make a difference. We want to hear from you: onesource@uga.edu.***

Participation Roles



Q&A

UNIVERSITY OF GEORGIA



OneSource

The University of Georgia's project to launch a new finance and human resources administration system that's integrated, efficient, modern and supports a data-driven environment

[Learn more](#) ▶



About



News



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Overview

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- [Project Organization](#)
- [Project Timeline](#)
- [Project Events](#)
- [FAQs](#)

Project Director

Chris Wilkins

chris.wilkins@uga.edu

Financials Lead

Holley Schramski

hschrams@uga.edu

Grants Lead

Ken Dover

kdover@uga.edu