



August 6, 2018

OneSource Summary and Key Messages

Business Officers, Project Coordinators, HR Officers, IT Officers

Fall Semester 2018

Summary:

The UGA community has embarked on a comprehensive business transformation project to adopt leading business practices, align our systems with those used by the University System of Georgia, and utilize a new finance and human resources administration system that is integrated, efficient, modern, and supports data-driven decision making.

UGA's OneSource Project is a multi-year project that will engage faculty and staff from every college, school, and unit at the University.

Key Messages for School/College/Unit Business Officers, Project Coordinators, HR Officers, and IT Officers:

- The UGA Budget Management System (Hyperion) was live January 2, 2018 and the UGA Financial Management System (PeopleSoft financial system) is now live July 2, 2018. By December 16, 2018 UGA will be live on OneUSG Connect, the PeopleSoft HR/Payroll System which will be used by all USG institutions.
 - The Budget Management and Financial systems are operational.
 - Learning to use the new chart of accounts is a significant change for users and while it is a challenge, it will provide more robust financial and budget management analysis and reporting. Users can ease this transition by using “speedtypes” or “accounting tags” which serve as a short-cut and reduce the amount of key entry.
 - As of July 2, 2018, the UGA Budget Management System uses FY19 data for budget management/reporting and required quarterly reviews. The system also holds FY18 and FY17 data cross-walked from the legacy chart of accounts to the new PeopleSoft chartfield format.
 - The UGA Financial Management System was live July 2, 2018 and is used to process travel authorities, employee expense reimbursements, payments to vendors, budget amendments (now called budget transfers and budget journals),



- general ledger journals including intra-University journals (formerly eTicket), asset management/property control, grants accounting, capital projects accounting, and billing and accounts receivable functions.
- UGA mart (for processing purchase requests and purchase orders) integrates with UGA Financial Management to encumber funds for purchase orders issued to vendors.
 - TouchNet is branded as UGA Cash Management System. This system records deposit transactions (credit card, cash, check receipts) and integrates with UGA Financial Management to record receipts to the ledgers.
 - These systems are transitioning from go-live into operational status. Users are supported by the [OneSource Service Desk](#). [Known issues and feature releases](#) (enhancements) are published for institutional awareness. Users of these systems also have access to the [OneSource Training Library](#) for self-service materials including tutorials, job aids, and walk-throughs/instructions on completing tasks in the new system
- All UGA employees (faculty, staff, graduate assistants, student employees, etc.) will experience changes as we implement OneUSG Connect for HR/Payroll. University-wide communications about these changes began in [February 2018](#) and will continue communications throughout the fall semester.
- The new Financial Management systems allow for new [business process improvements](#) such as:
 - Travel receipts can be captured with a mobile device to store in an electronic “wallet” until the expense report is prepared.
 - Monthly Personnel Activity Reports (PAR) are replaced with annual and end-of-[project certifications](#). Project salaries (rather than percent effort) will be certified.
 - Manual and/or paper-based processes are eliminated.
 - Improved access to financial data through the new [UGA Data Warehouse](#).
- Several query/reporting tools will utilize the UGA Data Warehouse architecture which was live July 2018.
 - For an inventory of queries and reports visit [reports.uga.edu](#).
 - The warehouse receives financial data from UGA Financial Management System nightly. This data is used by UGA Budget Management System, Analytical Cubes, Paginated Reports, Visualization/Dashboards (Tableau), and will be used by the Simpler Query tool.
 - Other university systems integrate with the Data Warehouse to receive financial data.
- HR and Payroll teams completed all business process design sessions in early spring 2018. Summaries of changes are available on the [OneSource website](#).
- OneSource teams are working this fall to convert HR/Payroll data to the OneUSG Connect system, test the system, train users, and complete readiness tasks.
- Kaba Time Clocks will be installed during the fall semester and employees who will use the clocks will be enrolled in the system.