UGA Financial Management System Go-Live Communication #1

Dear Project Coordinators,

This is an exciting time as we approach the July 2018 go-live for the UGA Financial Management System. In addition to the go-live of the UGA Financial Management System, there will be a feature release for the UGA Budget Management System. The OneSource project could not have completed this goal without your commitment and engagement; thank you for all your efforts to make this possible.

You will receive go-live emails on May 7, June 4, June 18, June 28, and July 2. All go-live communications will be available on the Readiness Kit-Checklist Resource Page.

As of July 1, 2018, the UGA Financial Management System will go-live with the functionality to support the following business processes:

- Accounts Payable (payment requests for invoices not associated with purchase orders)
- Asset Management (equipment inventory and accounting for assets)
- Accounts Receivable and Billing (for units in Cohort 1 only)
- Cash Management (Cash/Check/Credit Card Deposits)
- General Ledger (Journal Entries and financial reporting)
- Grants Management and Project Costing for sponsored projects
- Project Costing for capital projects and non-sponsored projects
- Purchasing (integration of UGAmart and PeopleSoft)
- Travel and Expense (travel authorities, travel expense statement payment requests, and requests to reimburse employees for other business expenses)

As of July 2018, the UGA Budget Management System will go-live with the functionality to support:

- Budget to Actual reporting and analysis
- Ability to create budget amendments for upload to the UGA Financial Management System. Alternatively, you can also enter budget amendments directly into the UGA Financial Management System.

The OneSource Project Team is developing a chart to describe functionality that will not be part of the July 2018 go-live. We want to share this information so you are aware of particular functionality that will not be in the July 2018 release but will be prioritized for a future quarterly release. Once this chart is available, it will be added to the OneSource website.
Action Steps for April

- Training: Prepare and Register
  
  o Review the Spring 2018 Training Guide.
  
  o Training is role-based so you will need to review the role spreadsheet you submitted to the OneSource Project team to help identify the training individuals in your unit will need based on the role you identified they need in the system.
  
  o April 9, 2018: Training registration will open and registration will be available via the UGA Financial Management Resource Page.
    - The first course open for registration is: OneSource 101 (UGA Financial Management System) Course.
    - The registration will be available from the UGA Financial Management Resource Page.
    - There will be online versions as well as in-person versions of classes to allow for distance learners and employees that may prefer to learn at their desk.
    - The target audiences for OneSource 101 are Chief Business Officers, School/College/Unit Business Office Staff, Approvers, Unit Heads and Supervisors.
    - A communication will be sent to Unit Heads, Project Coordinators, Change Champions, and the OneSource listserv that registration is open.
    - A recorded version of the training will be available.
  
  o April 16, 2018: The additional trainings for May 2018-June 2018 will be published on April 16, 2018. Registration will be available via the UGA Financial Management Resource Page. This will include trainings related to the UGA Budget Management System, UGA Financial Management System, and the Data Warehouse.
    - The UGA Financial Management Resource Page will have a list of the classes available and how to register.
    - The registration will be available from the UGA Financial Management Resource Page.
    - There will be online versions as well as in person versions of classes to allow for distance learners and employees that may prefer to learn at their desk.
    - The target audience for the May 2018-June 2018 classes are individuals who will be using the UGA Financial Management System and UGA Budget Management System based on the roles submitted to the OneSource team.
    - A communication will be sent to Project Coordinators, Change Champions, and the OneSource listserv that registration is open.
Action Steps for April (cont’d)

- Please review the Chart of Accounts Resource page for a full listing of financial/cost center departments for use in the UGA Budget and Financial Management Systems. Make plans and ensure individuals know about these financial/cost center departments in your organization and how they will need to use these for financial transactions beginning July 2018. The full crosswalk will be published on the Chart of Accounts Resource page on April 9 and bi-weekly at minimum from that date forward.

- Please review the Technical Resources page regarding specific requirements for the UGA Budget and Financial Management Systems. Some add-ons that may need to be installed on your office computer/laptop. You may need to discuss these with your school/college/unit technical staff.

- Please share with those individuals in your organization that the OneSource Service Desk is the official means of receiving support for OneSource systems. The Service Desk may be contacted by:
  - Submitting a ticket: Click here to submit a ticket
  - Phone: 706-542-0202
  - Email: onesource@uga.edu

- Please visit the UGA Financial Management Resources Page and UGA Budget Management Resource Page for additional information about the systems; new information will be added to these pages in preparation for the July 2018 go-live and after that date for updates as needed.
Action Steps for May

- **Training:**
  - Ensure employees register and attend May trainings.
  - Ensure employees register for June trainings.
  - Watch for additional training opportunities as they are released.

- **UGA Financial Management System Access and Security Roles:**
  - Final system access/security roles will be distributed to you in May 2018. This information is provided for you to review and update based on unit changes since the original submission. You will need to complete this unit request in June 2018 to ensure user access is ready for go-live.
  - Access will be provisioned based on your June 2018 response. Users will be loaded into the UGA Financial Management System using your confirmation.

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  - Phone: 706-542-0202
  - Email: [onesource@uga.edu](mailto:onesource@uga.edu)

- **OneSource website changes:**
  - The OneSource main page (onesource.uga.edu) will have a new look in May and will provide quick access to the UGA Budget and Financial Management systems via links on the main page.
Action Steps for June:

- **Training:**
  - Ensure employees attend June trainings based on their user/security role.
  - Ensure employees review recorded trainings and job aids that will be available on the [UGA Financial Management Resource Page](#) and [UGA Budget Management Resource Page](#).
  - Watch for additional training opportunities as they are released.

- **UGA Financial Management System Access and Security Roles:**
  - Final signoff for system access/security roles will need to completed and submitted to OneSource in June 2018.
  - Access will be provisioned based on this submission. Users will be bulk into the UGA Financial Management System using your confirmation.
  - Changes that need to happen for role assignments after June 1 can be requested starting July 1.

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- **Go-Live: Prepare**
  - Systems lock-out and black-out dates will begin in late June. Please ensure you are familiar with these dates and have shared these dates with your organization. See [System Changes Resource Page](#).
Action Steps for July:

- **Training:**
  - Ensure employees review online trainings and job aids that will be available on the [UGA Financial Management Resources page](#) and [UGA Budget Management Resource Page](#).

- **UGA Financial Management System Access and Security Roles:**
  - Beginning on July 1, 2018, request for access to the UGA Budget and Financial Management Systems will use the access request form within the UGA Financial Management System.

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- **Go-Live: Support**
  - There will be enhanced status and support mechanisms available during go-live. Additional details about this status/support format will be shared in advance of go-live.
Please feel free to contact UGA's OneSource Project (onesource@uga.edu) if you have any questions or if you'd like to submit any suggestions or recommendations. We appreciate your input and know it will benefit this project. For more information on UGA’s OneSource project, please visit onesource.uga.edu

Sincerely,
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