

UGA Financial Management System Go-Live Communication #2

Dear Project Coordinators:

This is our second in a series of communications for the UGA Financial Management System go live and feature releases on the UGA Budget Management System. The OneSource project deeply appreciates your engagement and involvement; thank you for the many hours of work in project meetings and in preparing your organization for using new systems and business processes.

You will receive additional go-live emails on June 4, June 18, June 28, and July 2. All go-live communications will be available on the [Readiness Kit-Checklist Resource Page](#).

As a reminder, 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 have the following feature releases:

- 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 has developed a chart to describe functionality that will not be initially available in July 2018 and will be prioritized for a future quarterly release. This chart is now available on the [UGA Financial Management Resource page](#).

Action Steps for May

- Training:
 - Ensure employees register and attend May trainings based on their security role. Please help us message this within your organization so that employees only register for the training sessions that align with their security role. We are thrilled that employees are so interested in training sessions even when they have not been assigned to perform certain roles in the system; however, we need to first make training seats available to employees with those official roles.
 - We are reaching out to individuals that registered for “in person” courses that do not align with their assigned security roles; we are letting them know that we will be cancelling their “in person” registrations. We are currently only monitoring the “in person” courses because those have a limited number of seats. Project coordinators received an email on Friday, May 4 about this topic with additional details.
 - Watch for additional training opportunities as they are released. SmartView courses (UGA Budget Management System) were recently added to the list of [May-June trainings](#).

- 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.
 - We will also be confirming CBO names and alternates to ensure the appropriate personnel are approving system access requests. These emails will be sent in May.

- Please share with those 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

- OneSource website changes:
 - The OneSource main page (onesource.uga.edu) has a new look in May and provides quick access to the UGA Budget and Financial Management systems via links on the main page.

- 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](#).
 - Information on what employees will need to do on the first days after go-live will be added to the OneSource website in June. This information is also highlighted in OneSource 101 Training.
 - Travel: The Travel Instructions Checklist is now available on the [Readiness Kit – Checklist Resource Page](#). This is a quick checklist you can provide to those faculty and staff who maybe traveling this summer and need to submit travel related expenses on or after July 1.

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 be completed and submitted to OneSource in June 2018.
 - Access will be provisioned based on this submission. Users will be bulk loaded 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.
- Please remind those in your organization that the OneSource Service Desk is the official means of receiving support for OneSource. The Service Desk may be contacted by:
 - Submitting a ticket: [Click here to submit a ticket](#)
 - Phone: 706-542-0202
 - Email: onesource@uga.edu
- 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](#).
 - Information on what employees will need to do on the first days after go-live will be added to the OneSource website in June. This information is also highlighted in OneSource 101 Training.
 - Travel: The Travel Instructions Checklist is now available on the [Readiness Kit – Checklist Resource Page](#). This is a quick checklist you can provide to those faculty and staff who maybe traveling this summer and need to submit travel related expenses on or after July 1.

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.
- Please share with those 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
- 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,

Sharon Logan
Financials Lead
UGA's OneSource Project
onesource@uga.edu

Holley Schramski
Project Director
UGA's OneSource Project
onesource@uga.edu