

UGA Financial Management System Go-Live Communication #4

Dear Project Coordinators:

This is our fourth 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.

Items in this go-live communication: The following topics are included in this communication. Please note any topics marked as “**New**” throughout the communication.

- Reporting Information
- UGA Cash Management Resource Page
- FY19 Budget/Faculty Contracts Information
- HR Reports To Reminders
- Technical Resource Page Reminder
- Simpler and UGA Budget Management Access

Information Items:

We will send additional go-live emails on June 28 and July 2.

All go-live communications will be available on the [Readiness Kit-Checklist Resource Page](#).

We will send a brief go-live e-mail to unit heads on June 20. This e-mail will be sent personally to each unit head (VP, Dean, and Director) and project coordinators will be copied on the go-live email. This communication will be available on the [Readiness Kit-Checklist Resource Page](#).

The OneSource Project Team has developed a Feature Release Resource page to describe functionality that will not be initially available in July 2018 and will be prioritized for a future quarterly release. This page is now available on the [UGA Feature Release Resource page](#).

Action Steps for June and July:

- 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](#).
 - Encourage employees to utilize and bookmark the OneSource Training Library: training.onesource.uga.edu
 - The OneSource Training Library provides self-service training.



- Watch for additional training opportunities as they are released on the [Training Resource Page](#).
- July – September 2018 trainings will be published in mid-June on the [Training Resource Page](#).
- OneSource 101 recording is now available on the [Online Training Resource Page](#).
 - The recording is divided in two parts:
 - Part I is geared toward general employees and managers.
 - Part II delves into details that employees with financial responsibilities may find more useful.
 - Additional recorded trainings will be added to this page.
- UGA Financial Management System Access and Security Roles:
 - Users will be bulk loaded into the UGA Financial Management System using your June 8th confirmation.
 - Changes that need to happen for role assignments after your confirmation can be requested starting Monday, July 2.
 - The [How To Request Access Resource Page](#) is now available and contains information regarding how to request access for various OneSource systems.
- **NEW:** Reporting and Data Analysis:
 - Information is available on the [Data Analysis & Reporting Resource Page](#).
 - To access the UGA Data Warehouse Reporting Portal, the user must be connected to the UGA campus remote access VPN (**02 Restricted VPN Group**). For more information on how to request 02 Restricted VPN access, [visit here](#).
- Service Desk and Known Issues:
 - 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:
 - [Submit a ticket](#):
 - Phone: 706-542-0202
 - E-mail: onesource@uga.edu
 - As we go-live, and issues are identified, they will be published on the [Known Issues Resource Page](#).
- Go-Live: Prepare
 - *Go-Live Status Calls:* Weekly go-live status calls will continue through July 26. Daily status calls will begin July 2 and continue until July 13. Registration information is available on the [OneSource website](#).
 - *System Lockouts:* 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](#).

- *Day 1:* Information on what employees will need to do on the first days after go-live has been added to the [Readiness Kit-Checklist Resource Page](#). This information is also highlighted in OneSource 101 Training. Be prepared for these two issues:
 - A user's security role may need to be adjusted and/or users may expect their role to be different than you have confirmed for them.
 - Supervisor approvals for travel items are set by the HR Reports To information in UGA Jobs. If it is not correct there, it will not be correct in UGA Financial Management.
- *Travel:* The Travel Instructions Checklist is 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 Monday, July 2.
- *Processing Transactions:* As the UGA community collectively transitions to the new financial system, we anticipate this learning curve will affect the usual pace of processing transactions in different offices. Despite the best planning and attending training sessions, there will be hiccups. Let us be patient with each other. All departments are committed to processing transactions as quickly as possible and will strive to move beyond the initial transition period in a timely manner.
- *Integrations:* The [Integrations Resource Page](#) has been developed to summarize key information regarding the available methods for integrating with the UGA Financial Management System.
- *VPN:* Off campus and non-Athens location users will need to sign in to the VPN to access the UGA Financial Management System. More information on downloading and installing the VPN can be found at: https://eits.uga.edu/access_and_security/infosec/tools/vpn/.
- *F&A Forms:* The [F&A Forms webpage](#) will be updated since many administrative forms will be replaced with functionality within the UGA Financial Management System, and therefore will be retired.
- *F&A Administrative Systems Page:* The [F&A Administrative System web page](#) will be transitioned to the OneSource website. There is no action to take as the current page will redirect to the new OneSource Administrative Systems Page.
- **NEW:** *UGA Cash Management Page:* The [Cash Management](#) resource page has been launched.
- **NEW:** *FY19 Budget/Faculty Contracts:* FY 19 Personnel documents can now be submitted. No Budget Amendments, whether stand alone or attached to a personnel, will be accepted through WebDFS for FY19. Those budget changes will happen in UGA Financial Management. For more information on FY19 Personnel procedures, please follow this link http://busfin.uga.edu/budget/pdf/FY19_Split_Implementation_Personnel_Instructions.pdf.

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- **NEW:** *HR Reports To Reminders:* As a reminder, the HR Reports To from UGAJobs (iPAWS) for benefits-eligible employees will be used in the UGA Financial Management System for various workflow processes including travel and expense. The Department Head for current (legacy) department is set as the “default” reports to for all other employees (hourly, student workers, temps). Additional information on HR Reports To is available on the [HR Reports To Resource Page](#).
 - **NEW:** *Technical Resource Page Reminder:* As a reminder, the [Technical Resource Page](#) provides information on system requirements for the various OneSource Systems.
 - **NEW:** *Simpler and UGA Budget Management System Access:* The process to request access to Simpler and the UGA Budget Management System will transition to the new Access Request Form in the UGA Financial Management System on July 2. In preparation for this transition, the current access request process for both systems will close on June 22 at 5 p.m. If you have access request for either system after June 22, please hold those requests until July 2.

Please feel free to contact UGA's OneSource Project (onesource@uga.edu) if you have any questions or if you would 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.

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