

UGA Financial Management System Go-Live Communication #5

Dear Project Coordinators:

In just a few more days, you will be using the new system! Congratulations!!

The daily and weekly status calls will be our primary method of communication from July 2-13. We will only send you go-live emails during these dates as necessary; a “go-live” wrap-up email will be sent on July 16. All go-live communications will be available on the [Readiness Kit-Checklist Resource Page](#).

Warning: This is a long email. We want to keep you updated and there is a lot of information to share. We have used **NEW** to highlight new information for you.

- **NEW** *Log-in Information:* To login to the UGA Financial Management System, go to onesource.uga.edu. Click on the Login button. This information is also included in the [Training Library](#).
- *Go-Live Status Calls:* Daily status calls will begin July 2 and continue until July 13. Weekly go-live status calls will continue through July 26. Registration information and recordings of and materials from previous status calls are available on the [Project Status Calls](#) 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.
- **NEW:** We know you have been busy communicating with your organization about go-live. There will be times when the Service Desk will need to refer a call or email to you as the Project Coordinator. You may find it helpful to send your unit a “go-live” reminder to contact you as Project Coordinator.
 - 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.
 - User roles have been loaded into the UGA Financial Management System.
 - The [How To Request Access Resource Page](#) is now available and contains information regarding how to request access for various OneSource systems.
 - The new Access Request Form will be available starting July 5th. If you have access requests on July 2-3, your Chief Business Officer will need to send the request to onesource@uga.edu. They are the approvers and therefore need to make this request until they can use the form on July 5th.

- 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.
 - 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** *FY18 Close and FY19 Start:*
 - FY18 close will occur in IMS as it always does.
 - The work to close FY18 (in IMS) continues through the first part of July.
 - FY19 original budget will be in the system on July 2.
 - FY19 personnel encumbrances will be in the system on July 2.
 - You may process FY19 budget journals or transfers (previously known as amendments) starting July 2.
 - UGA mart will open for FY19 on July 9. Prior year PO encumbrances are being converted in UGA mart and will be visible in Financial Management. We will keep you posted on this conversion timing in our daily status calls.

- **NEW** *Known Issues:* As we go-live, and issues are identified, they will be published on the [Known Issues Resource Page](#). [Items published may also include awareness/informational topics](#).

- *Feature Releases:* The OneSource Project Team has created 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. Our first feature release is noted below.

- **NEW** *UGA Budget Management System:*
 - Initiating Budget Journals:
 - July 2: All UGA Budget Management users with the UGA GL Bud Jrnl Initiator role in Financial Management will be given access to initiate budget journals in the UGA Budget Management system.
 - After July 2: All users with Budget Management access for whom the UGA GL Bud Jrnl Initiator is requested will be given access to initiate budget journals in Financial Management via direct entry, spreadsheet uploader, or UGA Budget Management.
 - New reports will be available in the UGA Budget Management System:
 - Departmental Tree
 - Quarterly Amendment Review
 - Fund Class Programs Report
 - Fund Class Balances
 - Department Fund Class Program Balance
 - Department Fund Class Report

- *Reporting and Data Analysis:*
 - **NEW:** A “How to Get Started with Reporting” training will be available online the week of July 2.
 - **NEW:** We are contacting Project Coordinators to schedule school/college/unit specific reporting workshops for late July and through August.
 - General 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](#).

- **NEW UGA Foundation Class Codes:** All non-scholarship funds held at the UGA Foundation (UGAF) have been assigned a UGA class code to allow for spending through the Financial Management System. For details on these class codes and FY19 budgets to spend these [Foundation](#) funds, see the information released earlier this week.

- **NEW Intra-university transactions:** The eTicket System becomes obsolete for processing intra-university buying & selling activity and is replaced by the Financial Management System general ledger journal entry process. Refer to this [June 26th communication](#) for more information.

- **NEW Business Process Improvements:** The OneSource Project Team has developed a list of [Business Process Improvements](#) that may be helpful to you in discussing broadly the benefits of the OneSource Project.

- **NEW Document Management & Archival Page:** The [Document Management and Archival Page](#) has been developed to summarize key information regarding the document management/archival strategy for key OneSource associated systems.

- *Training:*
 - Encourage employees to utilize and bookmark the OneSource Training Library: training.onesource.uga.edu
 - Ensure employees attend July trainings based on their user/security role.
 - Visit the [Training Resource Page](#) for updated information on training. New offerings including online resources will be published there.

- *Service Desk*
 - 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
 - Email: onesource@uga.edu



Thank you again for your partnership and all the hard work. We are looking forward to working through go-live with you.

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.

Sincerely,

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