

UGA Financial Management System Go-Live Communication #3

Dear Project Coordinators:

This is our third 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.

Information Items:

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

We also plan to send a brief go-live email to unit heads on June 20. This email will be sent personally to each unit head and project coordinators will be copied on the go-live email. This communication 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:

- 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.
- Budget to Actual reporting and analysis of the UGA Financial Management data
- Important information regarding FY17 and FY18 data in the UGA Budget Management System:
 - We want to remind you that these records are derived from the legacy mainframe systems; however, they have been converted through the chart of accounts cross-walk which is still being refined. Please be alert for any discrepancies between the

FY17 and FY18 data in the UGA Budget Management System and the source legacy financial systems. Please continue use historical account status reports, Arrow reports, and/or QMF or Simpler queries from mainframe system data for any FY17 and FY18 reports and decision making until we publish the final cross-walk conversion . See the [UGA Budget Management System Resource](#) page for more information.

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:
 - Final sign-off for system access/security roles will need to be completed and submitted to OneSource by June 8, 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 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.

- 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:
 - Submitting a ticket: [Click here to submit a ticket](#)
 - Phone: 706-542-0202
 - Email: onesource@uga.edu
 - As we go-live, there will be issues identified which have a broad impact to the campus community. Information on these known issues will be available on the [Known Issues Resource Page](#).

- Go-Live: Prepare
 - *Go-Live Status Calls*: Weekly go-live status calls will begin on June 7 and continue through July 26. Daily status calls will begin on July 2 and continue until July 13. Registration information is available on the [OneSource website](#).
 - *System Lock-outs*: 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.
 - *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's 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.



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- *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.

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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