



# OneSource Training Guide

## What kind of training is available?

To serve the thousands of employees using the OneSource systems, there are learning opportunities offered in one or more of the following formats:

- **Self-Service (available 24/7):** Self-led training exercises available in the OneSource Training Library ([training.onesource.uga.edu](http://training.onesource.uga.edu)). Can be accessed at your convenience for a simulated hands-on experience that walks you through every step in a process. Most courses are available in this format, and some courses are only available in this format.
- **Recorded (available for most courses):** A recorded webinar of the course with an instructor. Allows you to learn at your own pace and at your own location. Most in-person courses are recorded and available in the [OneSource Training Library](#).
- **Interactive Webinar (periodically available):** Led by a live instructor, allows you the comfort and convenience of listening at your own location. You can submit questions during the session.
- **In Person (periodically available):** Held in a large lecture hall or computer classroom, depending on the course.

## Who should attend?

Staff and faculty who have responsibilities in the OneSource systems can review relevant training. New employees may find the Training Library helpful to learn the UGA processes relating to their jobs. New training is also released frequently when new functionality is released and based on campus interest.

## Where can I find out more about the specific courses?

Full course descriptions can be found in the OneSource Catalog:  
<https://onesource.uga.edu/resources/training/>

## What if I'm not sure which courses I should attend?

- Talk with your manager about the roles that you have been assigned and find which training is offered for those roles.
- If you are a financial practitioner (you have financial tasks or responsibilities), you may want to start with OneSource Financials 101 to get an overview of the functionality in the system.
- If you are a system manager or otherwise have HR/payroll responsibilities (such as approving time for your employees), you may want to start with OneUSG Connect 101 to get an overview of the functionality of the system.
- Walk through the Self-Service topics, like UGA Financial Management System Basics, to get an understanding of how the systems look and feel. The OneSource Training Library contains all the Self-Service exercises and is available at [training.onesource.uga.edu](http://training.onesource.uga.edu).

# OneSource Training Guide

For the most up-to-date information on training, including available formats, please see the OneSource Training Resources page at <https://onesource.uga.edu/resources/training/>.

Course Title	Audience	Security Role	Format
<b>UGA FINANCIAL MANAGEMENT SYSTEM</b>			
<b>Introductory Courses</b>			
UGA Financial Management System Basics	Open to all employees	All	<input type="checkbox"/> Self-Service
Access Request, Security, and Workflow	For anyone assigning security roles in UGA Financials	Reports-To Managers and Chief Business Officers	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
What's New in Financials in May 2019?	For anyone working in UGA Financials	All	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
OneSource 101 (Financials)	Suggested prerequisite for all Financial Courses, Open to all employees	All	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Understanding the Chart of Accounts	Suggested Prerequisite for all Financial Courses, Open to all employees	All	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
<b>Accounts Payable</b>			
Accounts Payable: Payment Requests and AP Journal Vouchers	Open to all employees	All, AP Distributed Initiator, AP Distributed Journal Voucher, AP Distributed Payment Approver	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Approving Accounts Payable Transactions	Highly suggested for associated roles, Open to all employees	Spend Approver 1, 2, 3	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
<b>Accounts Receivable</b>			
Accounts Receivable	By invitation only	AR Cohorts only	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Billing	By invitation only	AR Cohorts only	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
<b>Asset Management (Property Control)</b>			
Maintaining Custodial Records (Inventory / Property Control)	<b>Required</b> for AM Department Update role	AM Department Update	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded <input type="checkbox"/> Interactive Webinar – Fall 2019
<b>Cash Management (Deposits)</b>			
UGA Cash Management System for Departmental Deposits	UGA employees who make departmental deposits	UGA employees who make departmental deposits	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
UGA Cash Management System for AR Cohorts	AR Cohorts only	UGA employees who make departmental deposits participating in AR Cohort	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
<b>UGA Foundation</b>			
Foundation Account	Open to all employees	Employees that work with Foundation accounts	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded

Course Title	Audience	Security Role	Format
<b>UGA FINANCIAL MANAGEMENT SYSTEM (cont.)</b>			
<b>General Ledger</b>			
Working with GL Journals	Highly suggested for associated roles, Open to all employees	GL Journal Initiator, Journal Approvers	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded <input type="checkbox"/> Interactive Webinar – Fall 2019
Approving GL and Budget Journals	Highly suggested for associated roles, Open to all employees	Journal Approver, Budget Journal Approver	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded <input type="checkbox"/> Interactive Webinar – Fall 2019
Maintaining SpeedTypes	Open to all employees	GL SpeedType Accounting Tag Maintenance	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Maintaining ChartFields	Open to all employees	GL Distributed Chartfield Req	<input type="checkbox"/> Self-Service
<b>Grants Management</b>			
Using the Grants Module in the UGA Financial Management System	Open to all employees	View Only, SPA Distributed Milestone Edit, SPA Pre-Award View	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
<b>Business Management</b>			
Financial Review and Analysis	Open to all CFOs/CBOs performing financial review and performance procedures	CBO/CFO role	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Introducing the Business Management Workcenter	Open to all UGA Financials users	All financials roles	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Month End Close Procedures	Open to all UGA Financials users	All financials roles	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded <input type="checkbox"/> Interactive Webinar – Fall 2019
<b>Procurement</b>			
Purchasing for Departments	Open to all employees	All	<input type="checkbox"/> Self-Service
UGAmart Basics – coming soon!	Open to all employees	All	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
<b>Project Costing</b>			
Reviewing My Projects	Open to all employees	All	<input type="checkbox"/> Self-Service
<b>StudyAway</b>			
StudyAway	Open to all employees	All	<input type="checkbox"/> Self-Service
<b>Travel and Expenses</b>			
Travel and Expenses: Travel Authorities and Employee Reimbursements	Open to all employees	All	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded <input type="checkbox"/> Interactive Webinar – Fall 2019
Approving Travel and Expenses	Highly suggested for associated roles, Open to all employees	Reports To Approvers, EX Distributed Expense Manager	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded <input type="checkbox"/> Interactive Webinar – Fall 2019

Course Title	Audience	Security Role	Format
<b>UGA BUDGET MANAGEMENT SYSTEM</b>			
UGA Budget Management System (Hyperion)	Open to all employees	UGA Budget Management System Access	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
What's New in BPSS in September 2016?	Employees that handle budget development for their department/unit	UGA Budget Management System Access	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded <input type="checkbox"/> Interactive Webinar – Fall 2019
Working with Budget Amendments	Highly suggested for associated roles, Open to all employees	Budget Journal Initiators, Journal Approvers	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Using Smart View	Open to all employees	UGA Budget Management System Access	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Budget Planning and Salary Setting for FY2020	Employees that handle budget development for their department/unit	UGA Budget Management System Access	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Quarterly Amendment Review for FY2020	Open to all employees	UGA Budget Management System Access	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded <input type="checkbox"/> In Person <input type="checkbox"/> Interactive Webinar – Fall 2019
<b>ONEUSG CONNECT</b>			
<b>Introductory Courses</b>			
OneUSG Connect Basics	Open to all employees	All	<input type="checkbox"/> Self-Service
What's New in OneUSG Connect in June 2019?	Open to all employees	HR Reports-To Supervisor, System Manager, Time and Absence Approver	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
OneUSG Connect Overview	Employees with HR responsibilities	HR Reports To Supervisors, Time & Absence Approvers, System Managers	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
<b>Employee Self-Service</b>			
Employee Self-Service MB: Monthly Employee with Benefits	Benefit-eligible staff paid monthly; Faculty and grad assistants should take the ESS course specific to their position	Monthly-paid employees with benefits	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Employee Self Service BB: Biweekly Employee with Benefits	Benefit-eligible staff paid biweekly	Biweekly-paid employee with benefits	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Employee Self-Service BNB: Biweekly Employee without Benefits	Biweekly staff who are not eligible for benefits; <b>includes student workers</b>	Biweekly-paid employee without benefits	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Employee Self-Service for Faculty	UGA Faculty	All faculty	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Employee Self-Service for Graduate Assistants	UGA students with Graduate Assistantships	All paid graduate teaching and research assistants	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
<b>Kaba</b>			
Kaba	Employees using the Kaba Time Clock		<input type="checkbox"/> Self-Service

Course Title	Audience	Security Role	Format
<b>ONEUSG CONNECT (cont.)</b>			
<b>Benefits</b>			
Benefits	Benefit-eligible faculty and staff		<input type="checkbox"/> Self-Service
<b>Faculty Contracts</b>			
Signing Your Faculty Contract in OneUSG Connect	Contract-eligible faculty	Faculty with access to Faculty Data Self Service page in OneUSG Connect	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Faculty Contract Delivery for Practitioners and Liaisons	Department staff that handle faculty contracts		
<b>Manager Self-Service</b>			
Manager Self Service for Supervisors	Faculty and staff who supervise employees, also known as HR Reports To Supervisors	HR Reports-To Supervisor	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Manager Self-Service for System Managers	Staff that handle HR functions for their larger units	UGA System Manager role	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
System Manager Update	Staff that handle HR functions for their larger units	UGA System Manager role	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded <input type="checkbox"/> Interactive Webinar – Fall 2019
Reporting and Queries in OneUSG Connect	Staff with access to the System Manager Reporting page	System Manager, CFO/CBO	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Approving Manager Self-Service (MSS) Transactions	Departmental approvers of MSS transactions	UGA System Manager role	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
<b>Time &amp; Absence Approvers</b>			
Time & Absence Approvers	Staff with the ability to approve time and leave that are not also HR Reports To Supervisors	T&A Approver	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
<b>Payroll</b>			
Payroll Processing	Staff with payroll responsibilities for their departments	All	<input type="checkbox"/> Self-Service
<b>UGAJobs</b>			
UGAJobs Refresher for Initiators & Approvers	Current users of UGAJobs	All	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
UGAJobs Direct Hires for New Initiators & Approvers	New users of UGAJobs	All	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
<b>Job Data Role</b>			
The Job Data View Role	Employees requiring visibility into job data pages in OneUSG Connect	Job Data View	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded

Course Title	Audience	Security Role	Format
<b>REPORTING/DATA WAREHOUSE</b>			
Understanding the Data Warehouse	Open to all employees	All	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Getting Started with Reporting	Open to all employees	All	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Reporting and Queries in OneUSG Connect	Staff with access to the System Manager Reporting page	System Manager, CFO/CBO	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Useful Reports for Year-End Budget Review	Staff with budgeting responsibilities	All	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Position Funding Cube Workshop	Staff with access to Data Warehouse	All	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded
Simpler	Staff with access to Simpler system	All	<input type="checkbox"/> Self-Service <input type="checkbox"/> Recorded <input type="checkbox"/> Interactive Webinar – Fall 2019

\*\*Look for additional training coming Fall 2019, including the Business Management Webinar Series, Excel Basics, and Campaign for Charities.