Project Update

BAAF

October 14, 2016

What is One Source?

- Multi-year business transformation project
- Replace many legacy administrative systems and associated business processes
- Next Generation Finance and Human Resource administrative systems and processes: Oracle PeopleSoft 9.2

Why undertake OneSource Project?

- **Aging Systems** - Core systems were designed decades ago with the purpose of satisfying the core processing and reporting requirements of the institution

- **Unsustainable** - Modifying these core systems when possible and implementing ad-hoc vendor provided systems to augment current system capabilities is no longer a sustainable practice or an efficient approach

- **UGA is ready** - Collegiate Project Services survey, interviews, and focus group sessions clearly identified that Colleges and Units need updated and efficient functionality, improved data access, and reporting

UGA Strategic Plan 2020

- **Strategic Direction VI**
- ***Improving and Maintaining Facilities and Infrastructure to Provide Excellence in Instruction, Research and Service***
- To achieve excellence in instruction, research, and service requires an investment in the underlying infrastructure of the campus that allows faculty, staff, and students to perform their functions with the greatest efficiency.
- **Strategic Priority**: Provide for technology infrastructure to meet the increased needs of instruction, research, service, and administration by replacing the legacy computing systems with modern systems having an emphasis on information systems that will improve the above functions.
- **Benchmark:** Stages of completion of the new system(s).
- **Goal:** A suite of modern computing systems that will meet the increased needs of instruction, research, service and administration by 2020.

Anticipated Benefits

- **Integration of data** across areas so that each department will have the information it requires when needed
- **Streamlined business processes** to enable faculty and staff to work and plan more effectively
- **Reporting tools** that will improve data access and UGA's ability to make data-driven decisions
- **Collaboration** with the University System of Georgia's "oneusg" project to provide standardized human resources business practices and IT platforms across institutions
- **Industry standards and best practices** identification and adoption for current and future information technology architecture
- **Improved data privacy and security**

Who will be affected?

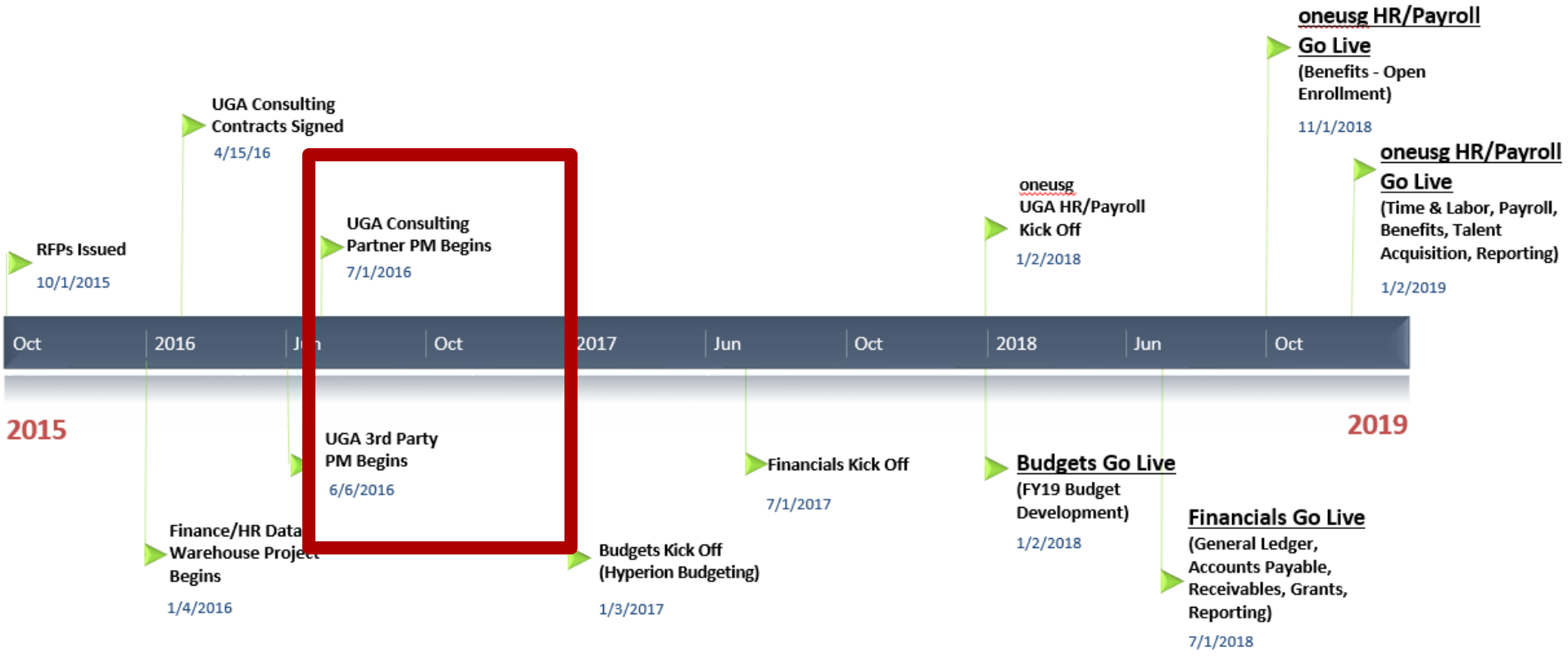
- **All faculty and staff**

  through Payroll and Human Resources processes and self-service features

- **All offices**

  through Financial & HR reporting, processes, and systems

OneSource Project Timeline



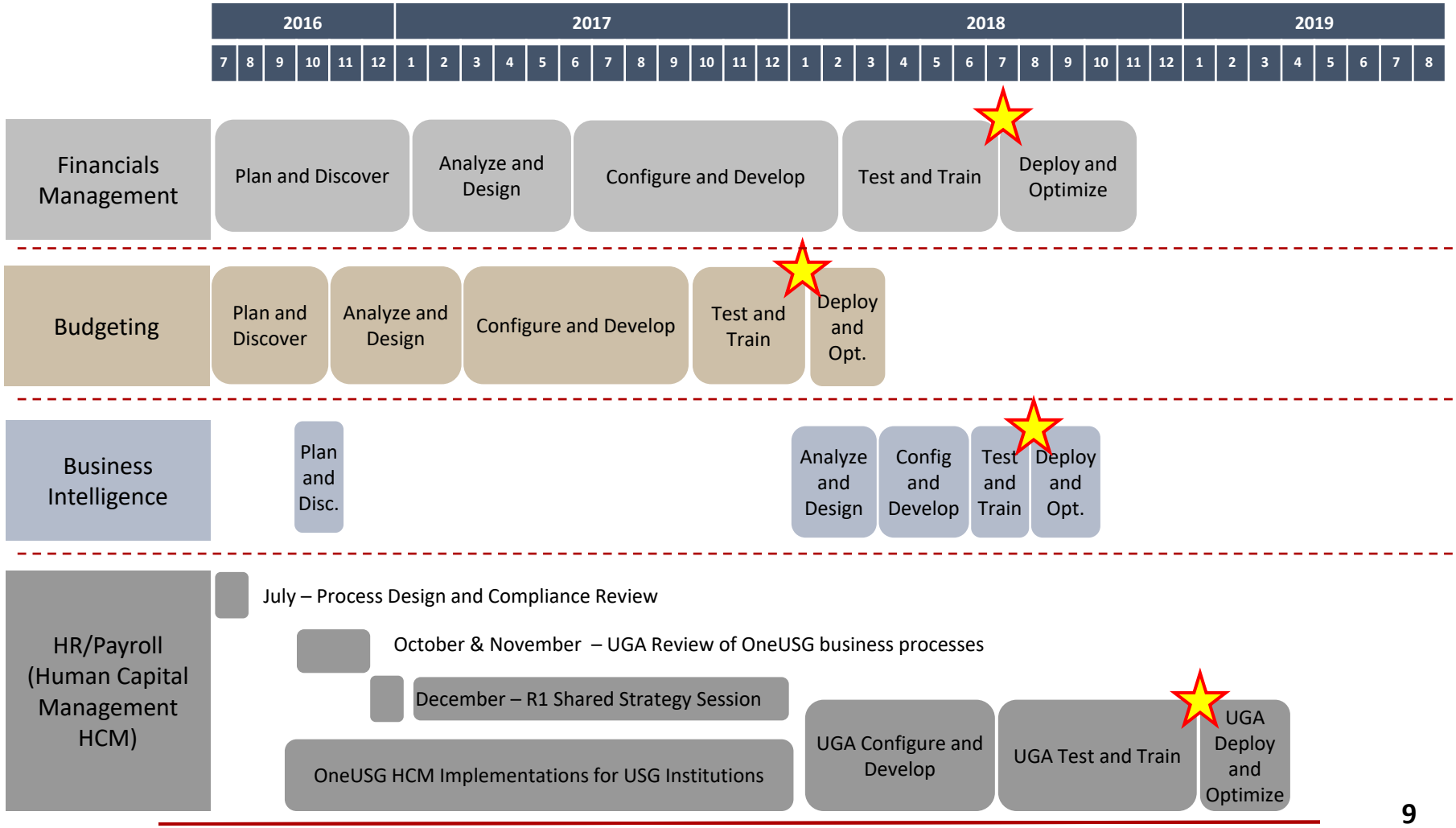
Accomplishments: July – September 2016

- ✓Simpler Training Completed
- ✓Project Participation Survey Completed
- ✓Purchasing – SciQuest Discovery Completed
- ✓Chart of Accounts Design – When finalized, detailed information on the Chart of Accounts will be available through onesource.uga.edu
- ✓Click/People Soft Grants Integration Review Completed
- ✓ Project Events page on OneSource Website Completed
- ✓ Project Brochure Completed

UGA OneSource Roadmap

DRAFT

Go Live



Implementation Activities*

PHASE I
Plan & Discover

- Planning and Orientation
- Project Readiness Assessment
- Project Readiness Assessment
- Business Process Overview
- Preliminary Fit/Gap Analysis
- Confirm Project Scope
- Preliminary Project Work Plan
- Project Charter

PHASE II
Analyze & Design

- Prepare Technical Environment
- Facilitate Interactive Design and Prototyping (IDP) Sessions (Detailed Fit/Gap Analysis)
- Build Preliminary System Prototype
- Develop Functional Specifications for Customizations, Modifications, Reports, and Interfaces
- Prepare Technical Plans
- Formulate Preliminary Training Plan
- Complete Detailed Project Work Plan
- Conduct Quality Assurance Review

PHASE III
Configure & Develop

- Update Technical Environment
- Develop and Migrate Customizations, Modifications, Reports, and Interfaces
- Convert Data
- Plan Security Scheme and Setup
- Conduct User Testing
- Redefine Business Processes
- Continue Configuration
- Complete the Configured System Prototype
- Prepare User Documentation and Communications
- Conduct Quality Assurance Review

PHASE IV
Test & Train

- Update the Infrastructure and Validate Conversion
- System/Integration, Acceptance, Performance, and/or Parallel Testing
- Transfer Knowledge by Jointly Finalizing the Configuration and Business Process Guides
- Train End Users
- Prepare to Go-Live
- Conduct a Quality Assurance Review

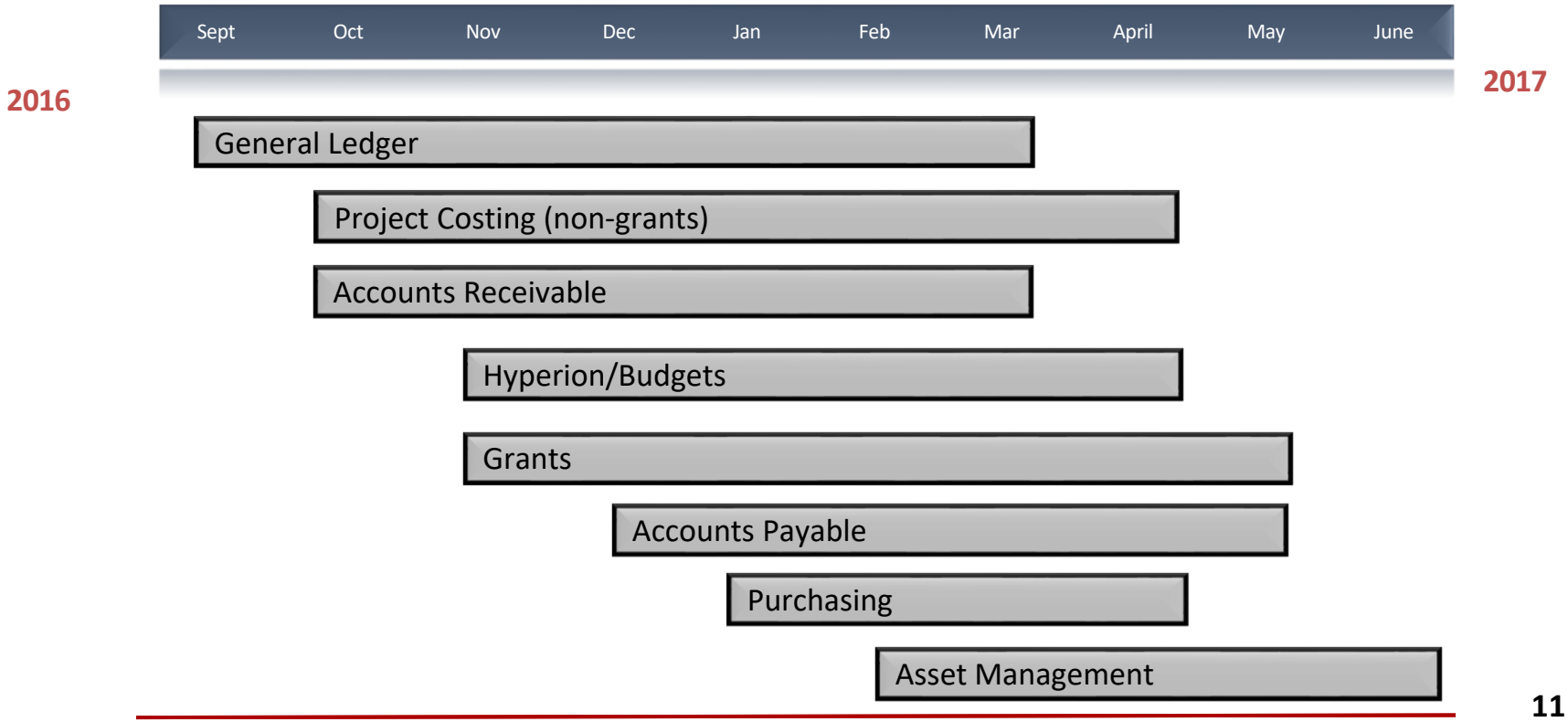
PHASE V
Deploy & Optimize

- Plan and Prepare for Production Cutover
- Develop Cutover and Contingency Plans
- Assess the Readiness to Go Live
- Cutover to Production
- Production Support Service
- Conduct an Assessment of the Project

*Propel Methodology

OneSource Financials Project Timeline
Phases I & II

Plan & Discover – Analyze & Design
Fall 2016 and Spring 2017



Other Activities: September – December 2016

- **HR/Payroll (HCM)**:
  R1 Shared Strategy and Requirements Sessions
  December

- **Purchasing (SciQuest UGAmart):**
  Value Integration Assessment
  October - November

- **Effort Reporting Options (PAR)**:
  Investigating Solutions

- **Business Intelligence Assessment:**
  September-November

How can I prepare for these changes?

- Use the OneSource website onesource.uga.edu as a resource
  - Project Events – Meeting Dates and Resource Materials
  - News – Information by topic (example- Chart of Accounts, Purchasing)

- OneSource listserv under development
  - A listserv of all existing business-type listservs (BAAF, BusinessServ-L, HR Partners, RADG, ITMF, UGANet, etc.)

- Become familiar with the chart fields design and structure

- Discuss within your organization. Share the OneSource brochure and the website link. Serve as key point of contact for your organization and submit questions and concerns to onesource@uga.edu. ***Your input and questions make a difference. We want to hear from you.***

- Participate

Participation – We Need Your Unit's Input

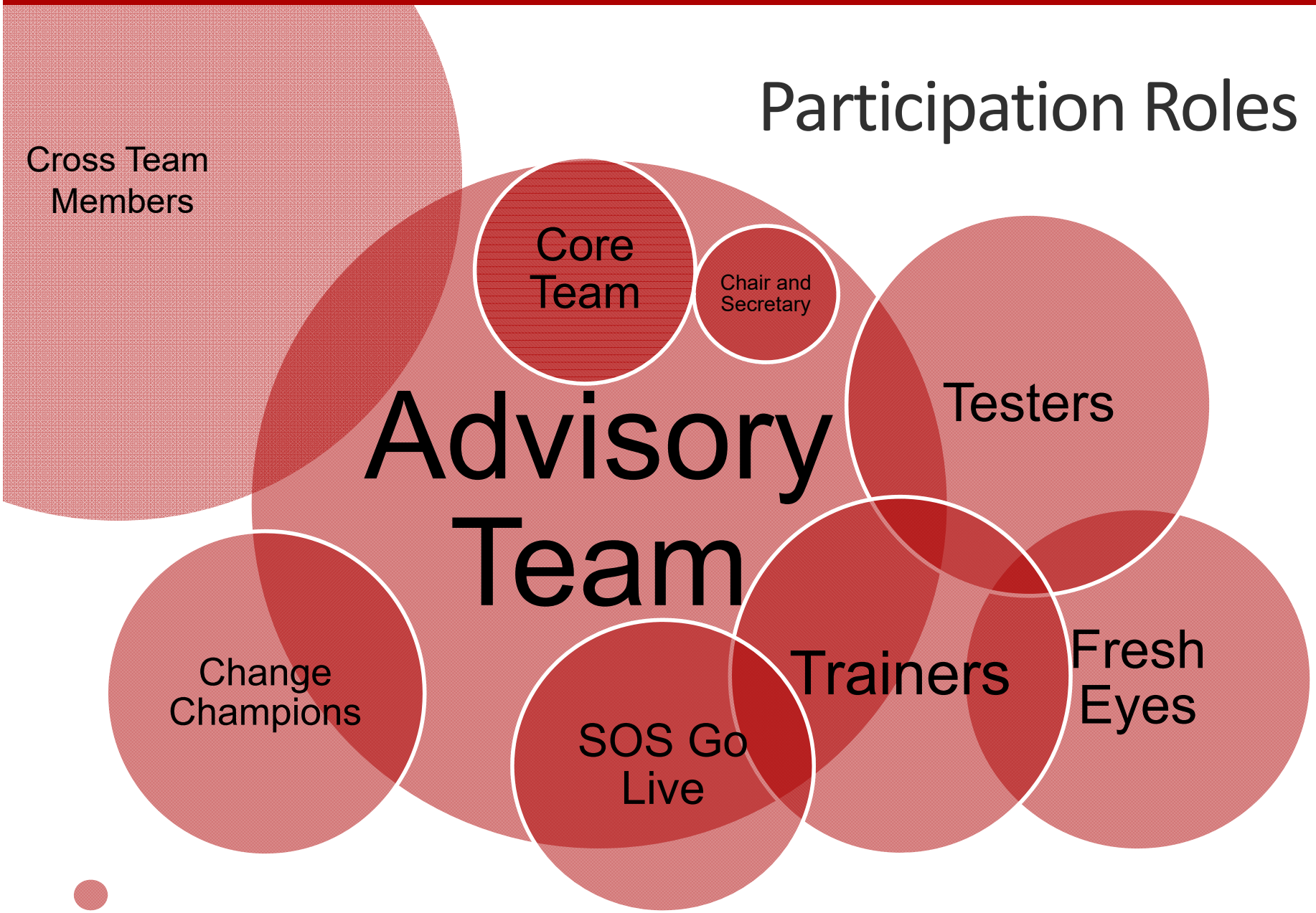
- **Why Should Your Unit Be Involved?**
  - Ensure you have input into all phases of the project
  - Bring to light the unique needs of your unit
  - Gain knowledge to assist with implementation

Success of the project is dependent upon campus involvement

Participation – Ways to be involved

- What Roles are Needed?
  - Change Champions
  - Core Team Members
  - Advisory Team Members
  - Testers
  - Trainers

Participation Roles



Participation – Your Unit's Input

- Are the right people at the table?
  - Encourage people to complete the participation survey
    - bit.ly/PartAdmin
  - Contact OneSource members directly
  - Unit meetings to identify participants

- Questions or Suggestions
  - OneSource
    - onesource@uga.edu
  - Penny Benton
    - pes@uga.edu
    - 542-1881

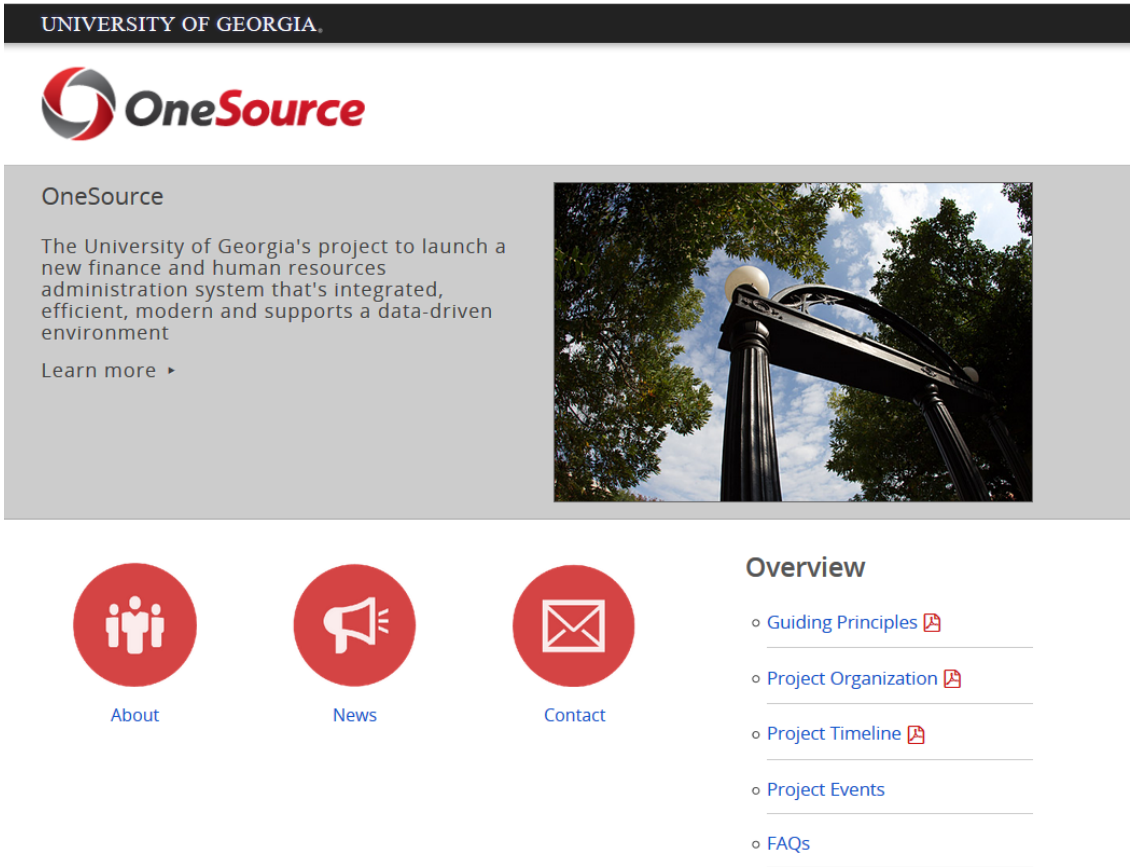
Q&A

Project Feedback

onesource.uga.edu

onesource@uga.edu

Project Director

Chris Wilkins

chris.wilkins@uga.edu