OneSource Course Catalog

Courses	Course Descriptions
Introductory Courses	
UGA Financial Management System (PeopleSoft) Basics	* Prerequisites: None. * Roles and Audience: All users of the UGA Financial Management System. * Current Equivalent: N/A * Format: Self-Service in the OneSource Training Library * Description: A general introduction to PeopleSoft, including logging in and basic navigation. Covers how (and why) to switch between fluid and classic views, how to use WorkCenters, and how to run PeopleSoft reports. Open to all UGA Employees.
OneSource 101 (Financials)	* Prerequisites: None. This course is a suggested prerequisite to other financial courses. * Roles and Audience: Suggested for all financial practitioners, or employees who have primary job responsibilities in the UGA Financial Management System. Open to all UGA Employees. * Current Equivalent: N/A * Format: In-Person, Interactive Webinar, Recorded, Self-Service in the OneSource Training Library * Description: A general introduction to UGA Financials (PeopleSoft). The first half of this class is geared toward what general employees and managers should expect, while the second half delves into details that employees with financial responsibilities may find more useful. This course includes basic navigation, changes to functionality, the new Chart of Accounts format, understanding approvals, where to run reports, and how to use the OneSource Training Library. This also covers transition from current systems and the split implementation period from July to December before we go live on OneUSG Connect (PeopleSoft HR/Payroll).
Understanding the Chart of Accounts	* Prerequisites: None * Roles and Audience: All financial practitioners, or employees who have primary job responsibilities in the UGA Financial Management System. Open to all UGA Employees. * Current Equivalent: Account numbers * Format: Recorded, Self-Service in the OneSource Training Library * Description: An introduction to the different Chartfields in PeopleSoft and how they are used in PeopleSoft and related

	financial systems. The course also covers how to use related shortcuts such as Accounting Tags and SpeedTypes.
Access Request, Security, and Workflow	*Prerequisites: None *Roles and Audience: Suggested for Chief Business Officers. Open to all financial practitioners, or employees who have primary job responsibilities in the UGA Financial Management System *Current Equivalent: None *Format: Self-Service, Recorded *Description: An overview of security and workflow in the UGA Financial Management System. Topics include assigning or removing approval roles, requesting temporary alternate approvers, and running related security and workflow queries.
Foundation Accounts	*Prerequisites: OneSource 101 *Roles and Audience: Open to all financial practitioners, or employees who have primary job responsibilities in the UGA Financial Management System *Current Equivalent: Foundation accounts *Format: Self-Service *Description: An overview of Foundation funds within the Financial Management System, including the new Foundation Class codes, changes to fund availability and expenditures allowed in OneSolution or Financials.
Asset Management (Property Control)	
Maintaining Custodial Records	BY INVITATION ONLY for in person registration. An interactive webinar is available for users who will not hold this role. * Prerequisites: None * Roles and Audience: Required for the AM Department Update role. * Current Equivalent: Property Control maintenance * Format: In-Person, Interactive Webinar, Recorded, Self-Service in the OneSource Training Library * Description: A course on editing asset (property) custodial records, including changing the location and custodian of an asset.

Accounts Payable	
Accounts Payable Lecture and Workshop: Payment Requests and JVs	* Prerequisites: OneSource 101 * Roles and Audience: Suggested for AP Distributed Initiator and AP Distributed Journal Voucher * Current Equivalent: Replaces some eCheck functionality. Replaces eJV for eCheck and PO transactions only. * Format: Interactive Webinar, Recorded, Self-Service in the OneSource Training Library * Description: A course that covers Accounts Payable (AP) functionality for distributed departments in the UGA Financial Management System. Topics include creating a submitting payment requests to suppliers (vendors) through the AP module and doing adjustments via Journal Voucher (JV) to payments made through the Payment Request Center and UGAmart. Course provides the opportunity to complete accounts payable tasks hands-on in the OneSource Training Library.
Approving Accounts Payable Transactions	*Prerequisites: None * Roles and Audience: AP Spend Approvers * Current Equivalent: Replaces some eCheck approval functionality. Replaces eJV approvals for eCheck and PO transactions only. *Format: Interactive Webinar, Recorded, Self-Service in the OneSource Training Library * Description: This short course covers Accounts Payable (AP) functionality for AP Spend Approvers in the UGA Financials system, including reviewing and approving payment requests to suppliers (vendors) through the AP module. Also includes approving adjustments via Journal Voucher (JV) to payments made through the Payment Request Center and UGAmart.
Accounts Receivable/Billing	
Accounts Receivable	* Prerequisites: OneSource 101 * Roles and Audience: By invitation only. * Current Equivalent: * Format: In-Person, Recorded, Self-Service in the OneSource Training Library * Description: A course on accounts receivable at UGA. Covers aging reports, creating and printing customer statements, creating dunning letters, and using the collections workbench.
Billing	* Prerequisites: OneSource 101 * Roles and Audience: By invitation only. * Current Equivalent: * Format: In-Person, Recorded, Self-Service in the OneSource Training Library * Description: A course on creating, reviewing, and monitoring billing activity in the UGA Financial Management System. This includes

	using the UGA customer request page, creating online bills, adjusting and crediting bills, reviewing summary and bill detail, reprinting invoices, and using the billing workcenter. It also covers the ability to process billing information within a unit.
Budgeting - UGA Budget Management System	
UGA Budget Management System (Hyperion)	* Prerequisites: None * Roles and Audience: CBOs and their designees * Current Equivalent: Budgeting and Balancing Accounts * Format: Recorded, Self-Service in the OneSource Training Library * Description: A general introduction to UGA's new Budget Management System (Hyperion) for viewing and understanding current financial data, including budgets and actuals, converted to the new Chart of Accounts format. Includes an overview of new budget procedures that will take effect with the July 1 go-live with UGA's Financial Management System (PeopleSoft).
Working with Budget Amendments	* Prerequisite: None* Roles and Audience: Department Budget Managers* Current Equivalent: Budget Amendments* Format: In-Person, Interactive Webinar, Recorded, Self-Service in the OneSource Training Library* Description: A course covering how to manage your budgets using tools found in UGA Financial Managements. Topics include creating, reviewing, and submitting budget journals.
Using SmartView (Excel) for the UGA Budget Management System	* Prerequisite: UGA Budget Management. * Roles and Audience: By invitation only. * Current Equivalent: * Format: In-Person (by invitation), Interactive Webinar, Recorded, Self-Service in the OneSource Training Library * Description: A course on using the SmartView tool to review and analyze budget information in UGA Budget Management (Hyperion).
Quarterly Budget Review	* Prerequisites: UGA Budget Management * Roles and Audience: Senior Budget Administrators with UGA Budget Management System Access (Hyperion) * Format: In-Person (by invitation), Recorded, Self-Service in the OneSource Training Library * Description: This course covers the requirements for your school/college/unit to say in compliance with UGA's quarterly amendment to the Board of Regents and Governor's Office. Includes the UGA Budget Management reports recommended to avoid overdrafting by control department and how to process an amendment to correct potential overdrafts.

Cash Management (Deposits)	
UGA Cash Management System (TouchNet) for Departmental Deposits	* Prerequisites: None * Roles and Audience: UGA employees that make departmental deposits * Current Equivalent: Transmittals for department deposits, including - ACH, cash, check, wire, and credit cards to include any units that do Dunbar pick up, experiments, and experiment stations * Format: In-Person, Interactive Webinar, Recorded, Self-Service in the OneSource Training Library * Description: A course on the use of TouchNet for departmental deposits, including preparing and submitting a deposit. Includes how to look up a deposit detail code or request a new one.
UGA Cash Management System (TouchNet) for Cohort I	* Prerequisites: None * Roles and Audience: UGA employees that make departmental deposits, AR Cohort 1 departments only * Current Equivalent: Transmittals for department deposits, including - ACH, cash, check, wire, and credit cards to include any units that do Dunbar pick up, experiments, and experiment stations * Format: Recorded, Self-Service in the OneSource Training Library * Description: A course on the use of UGA Cash Management (TouchNet) for departmental deposits directed towards members of Accounts Receivable Cohort 1.
Data Warehouse and Reporting	
Understanding the Data Warehouse	* Prerequisites: None * Roles and Audience: All financial practitioners * Current Equivalent: * Format: In-Person, Interactive Webinar, Recorded, Self-Service in the OneSource Training Library * Description: A course covering the UGA Data Warehouse, including how to run reports. Includes an overview of other UGA Financial Management System reporting tools.
Getting Started with Reporting	* Prerequisites: None * Roles and Audience: All financial practitioners * Current Equivalent: Various legacy reporting systems * Format: Recorded, Self-Service in the OneSource Training Library * Description: An introduction to the future reporting tools available at UGA. Topics include how to select the appropriate reporting tools for the information you need, how to run a queries and reports in UGA Financial Managment, UGA Budget Management, and the Data Warehouse.

General Ledger	
Maintaining SpeedTypes	BY INVITATION ONLY for in person classes * Prerequisites: OneSource 101; Required for individuals with the GL SpeedType Accounting Tag Maintenance role. * Roles and Audience: In person course by invitation only. Required for individuals with the GL SpeedType Accounting Tag Maintenance role. Interactive Webinar is open to any financial user. * Current Equivalent: Requesting new accounts * Format: In-Person (role only), Interactive Webinar, Recorded, Self-Service in the OneSource Training Library * Description: A course on how to request, add, and delete SpeedTypes and Accounting Tags.
Maintaining ChartFields	* Prerequisites: OneSource 101 * Roles and Audience: Open to all financial practitioners * Current Equivalent: Requesting new accounts * Format: Self-Service in the OneSource Training Library * Description: A course covering the Chatfield request process and SpeedType.
Split Implementation	* Prerequisites: OneSource 101 * Roles and Audience: Open to all employees * Current Equivalent: N/A * Format: Self-Service, Recorded, Interactive Webinar * Description: A course on the split implementation period from the go-live of the UGA Financial Management System on July 2 and the go-live of OneUSG Connect in December 2018 for HR/Payroll information. This course includes information on personnels, payroll reconciliation, and HR-Reports To during the split.
Working with GL Journals	* Prerequisites: OneSource 101 * Roles and Audience: GL Journal Initiators, Journal Approvers * Current Equivalent: eTicket and eJV (excluding PO and eCheck transactions) * Format: In-Person, Interactive Webinar, Recorded, Self-Service in the OneSource Training Library * Description: A course on how to create and submit online and spreadsheet journal entries. This course also covers the journal approval process.
Approving GL and Budget Journals	* Prerequisites: None * Roles and Audience: For Journal Approvers who do not enter journals * Current Equivalent: Approving JVs and eTicket * Format: Self-Service, Recorded, Interactive Webinar

	* Description: A brief overview of the approval process for Journal Approvers. This course covers how to approve and deny both budget journals and GL journals.
Grants Management	
Using the Grants Module in the UGA Financial Management System	* Prerequisites: None * Roles and Audience: UGA distributed department users who have a role in the financial management of sponsored projects * Current Equivalent: Grants accounting and reporting from mainframe (IMS) systems * Format: In-Person, Interactive Webinar, Recorded, Self-Service in the OneSource Training Library * Description: This course covers the basics of where to find information in UGA Financial Management for financial and some compliance decisions. Users will learn to navigate the UGA Financial Management grants module, including project budgets and awards pages. It also covers the personal Grants WorkCenter along with other available tools.
Creating Departmental Milestones for Sponsored Projects	* Prerequisites: Grants Processing for University Departments OR Using the Grants Module in the UGA Financial Management System * Roles and Audience: Required for users with the SPA Distributed Milestone Edit role * Current Equivalent: Grants accounting and reporting from mainframe (IMS) systems * Format: Recorded, Self-Service in the OneSource Training Library * Description: This short course covers how to create and edit milestones in the UGA Financial Management System to assist in tracking tasks related to projects.
Project Costing	
Reviewing My Projects	* Prerequisites: None * Roles and Audience: All financial practitioners * Current Equivalent: * Format: Self-Service in the OneSource Training Library * Description: A course on how to review project progress in the UGA Financial Management System.

Purchasing	
Purchasing for Departments	*Prerequisites: None * Roles and Audience: All financial practitioners * Current Equivalent: * Format: Self-Service in the OneSource Training Library *Description: A course covering how information moves through UGAmart into the UGA Financial Management System.
Travel and Expense	
Travel and Expenses Lecture and Workshop: Travel Authorities and Reimbursements for Employees	* Prerequisites: OneSource 101 * Roles and Audience: Open to all UGA employees * Current Equivalent: Travel Authorities and eCheck payments (to Employees for travel or expenses) * Format: Interactive Webinar, Recorded, Self-Service in the OneSource Training Library * Description: A course on creating and submitting travel-related documents for UGA employees, including travel authorities and expense reports. Also covers non-travel related expenses for employees. Course provides the opportunity to complete travel and expenses tasks hands-on in the OneSource Training Library.
Approving Travel Authorities and Expense Reports	*Prerequisites: None * Roles and Audience: Expense Approvers, HR Reports-To Approvers, Distributed Expense Managers * Current Equivalent: Replaces some eCheck approval functionality. Replaces eJV approvals for eCheck and PO transactions only. *Format: Interactive Webinar, Recorded, Self-Service in the OneSource Training Library * Description: A short course that covers travel and expenses tasks for Expense Approvers in the UGA Financial Management System, including reviewing and approving travel authorities, expense reports, and non-travel expenses for UGA employees.