Project Overview

Summer - Fall 2016

Today's Goals

At a high level:

- Why this project?
- Who is involved?
- When will it happen?
- What will change?
- How will it affect me?

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 <u>decades ago </u>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 <u>no longer a sustainable</u> practice or an efficient approach

- **UGA is ready** - Collegiate Project Services survey, interviews, and focus group sessions clearly identified that <u>Colleges and Units need</u> 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

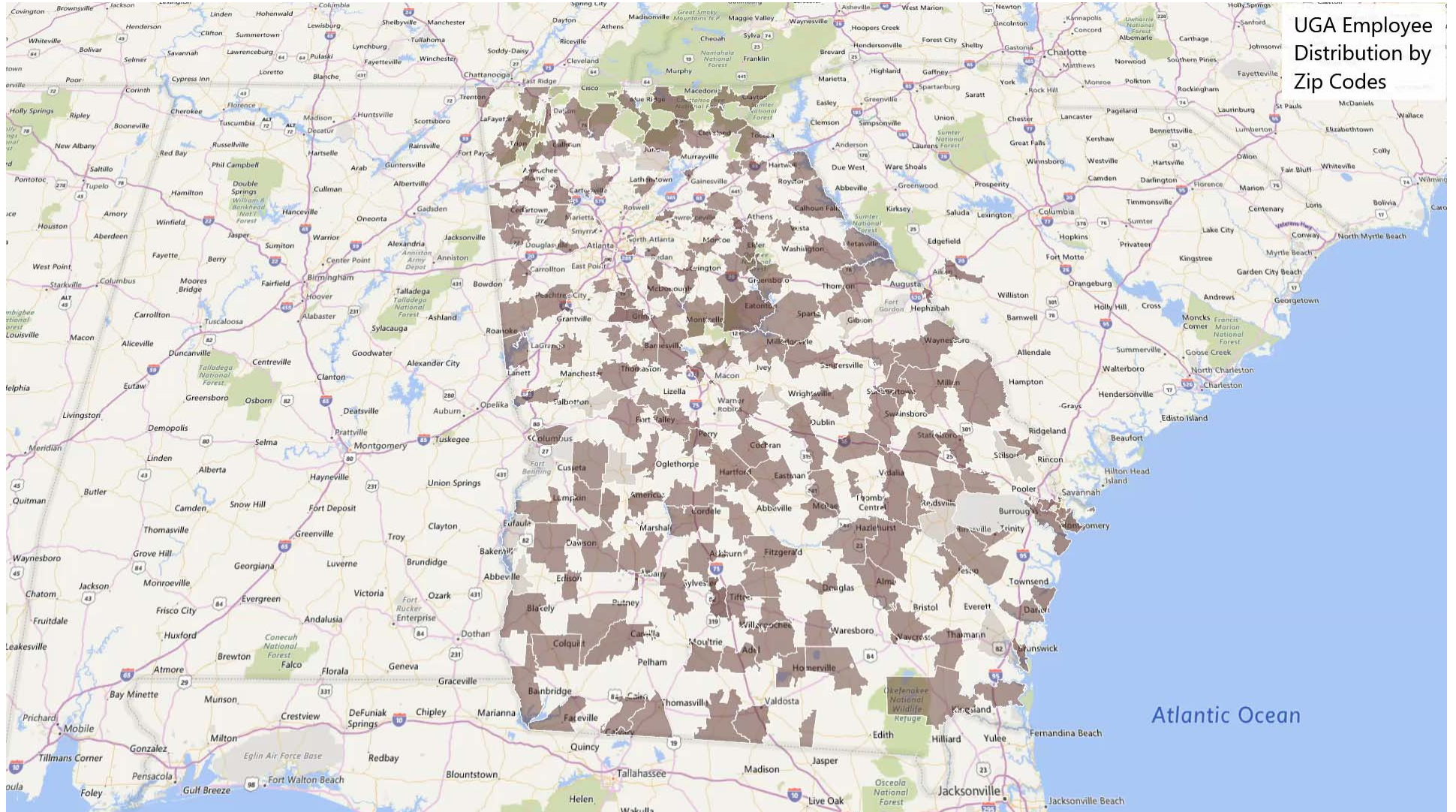- **Improved data privacy and security**

Who will be affected?

- **All faculty and staff**

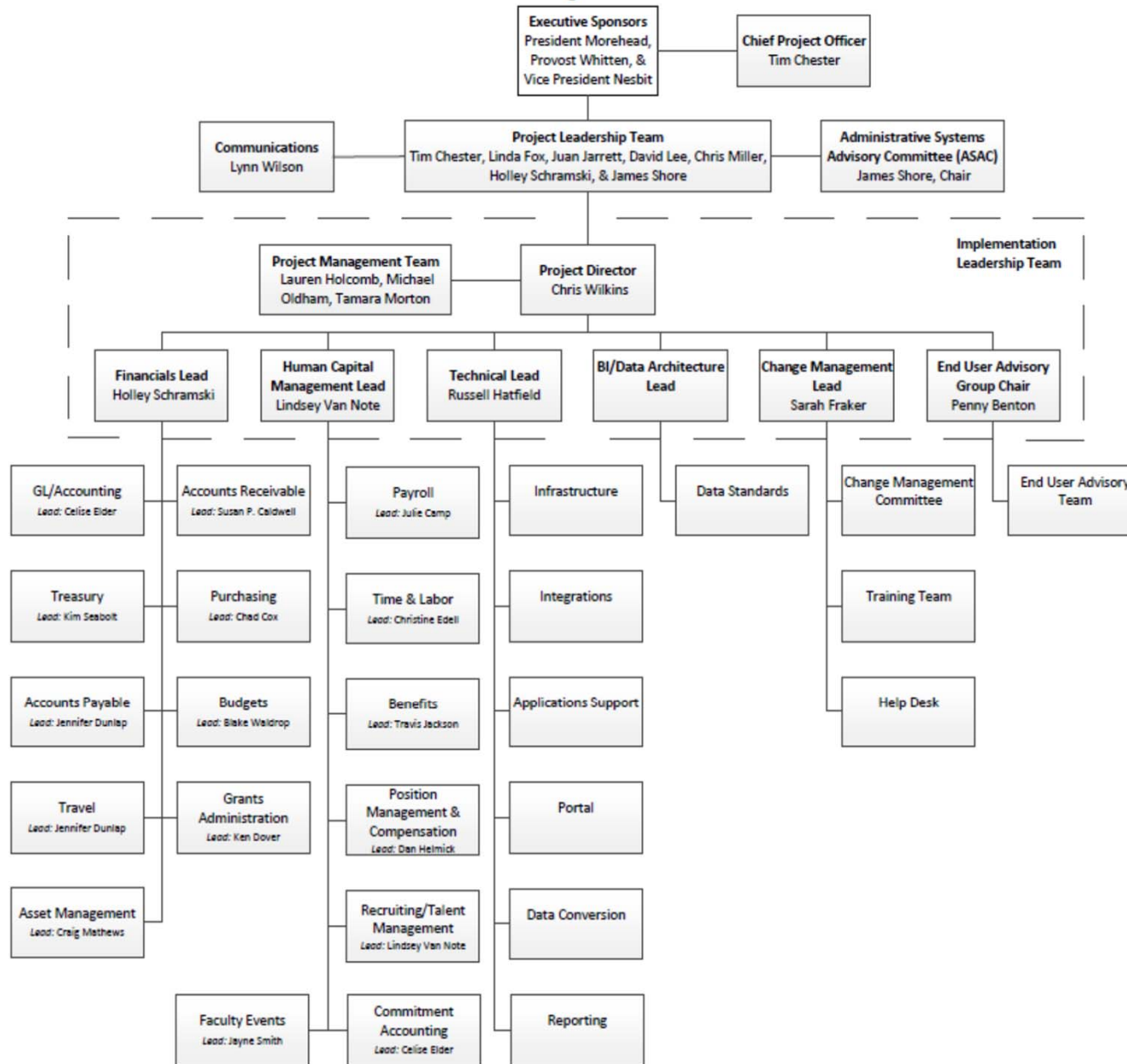 through Payroll and Human Resources processes and self-service features

- **All offices**

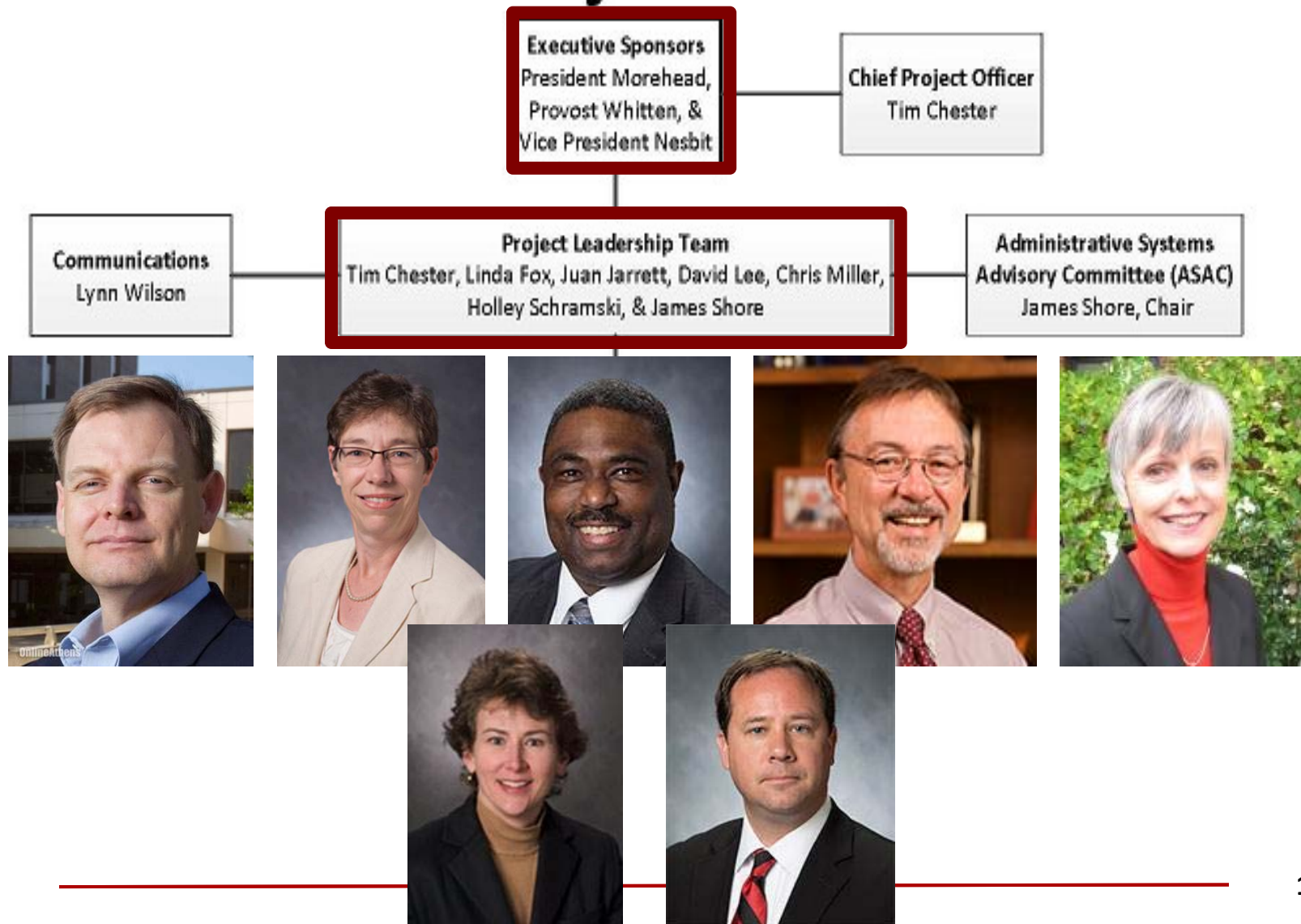 through Financial & HR reporting, processes, and systems
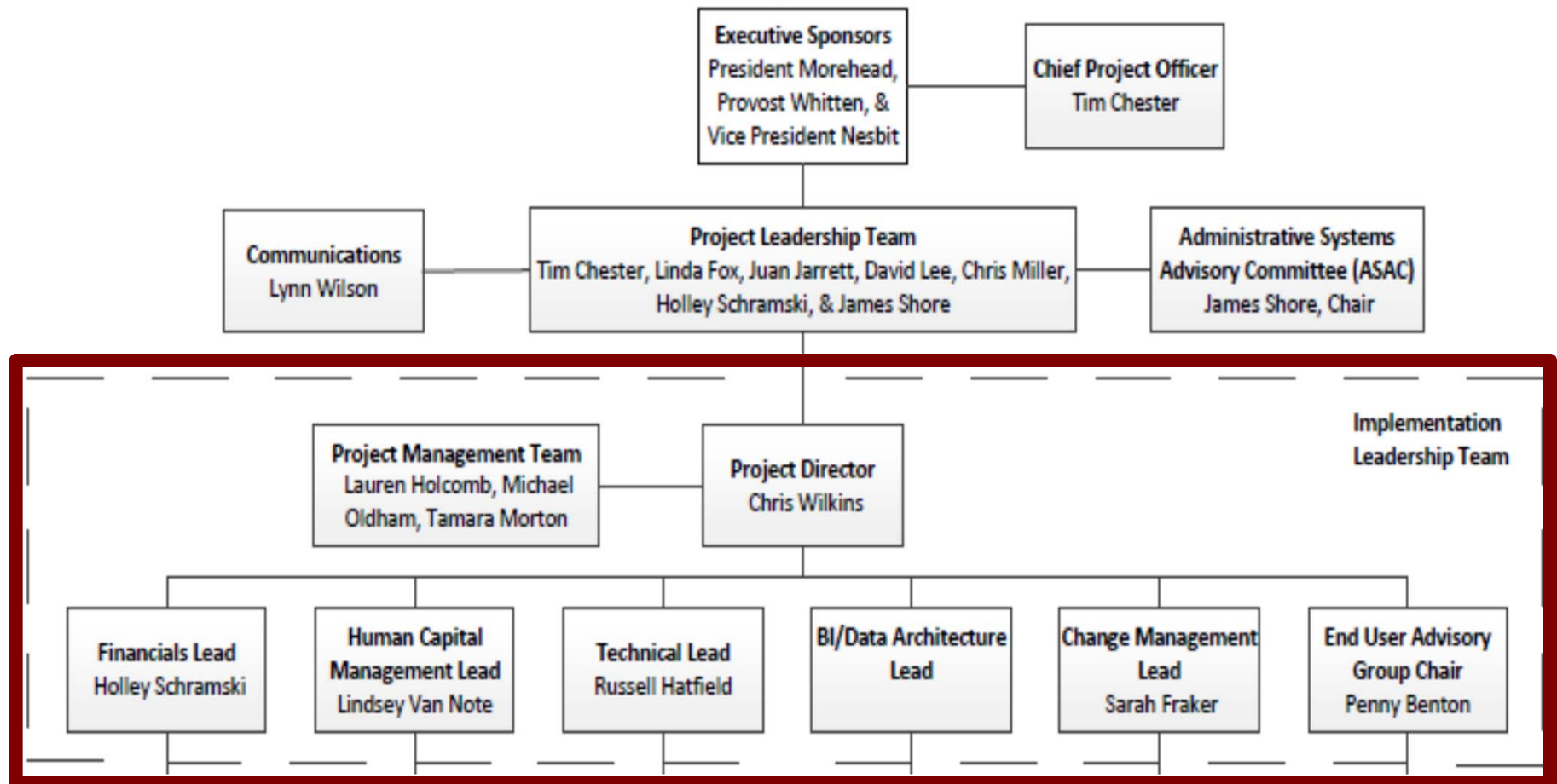
Employee mapping across the state

UGA Employee Distribution by Zip Codes
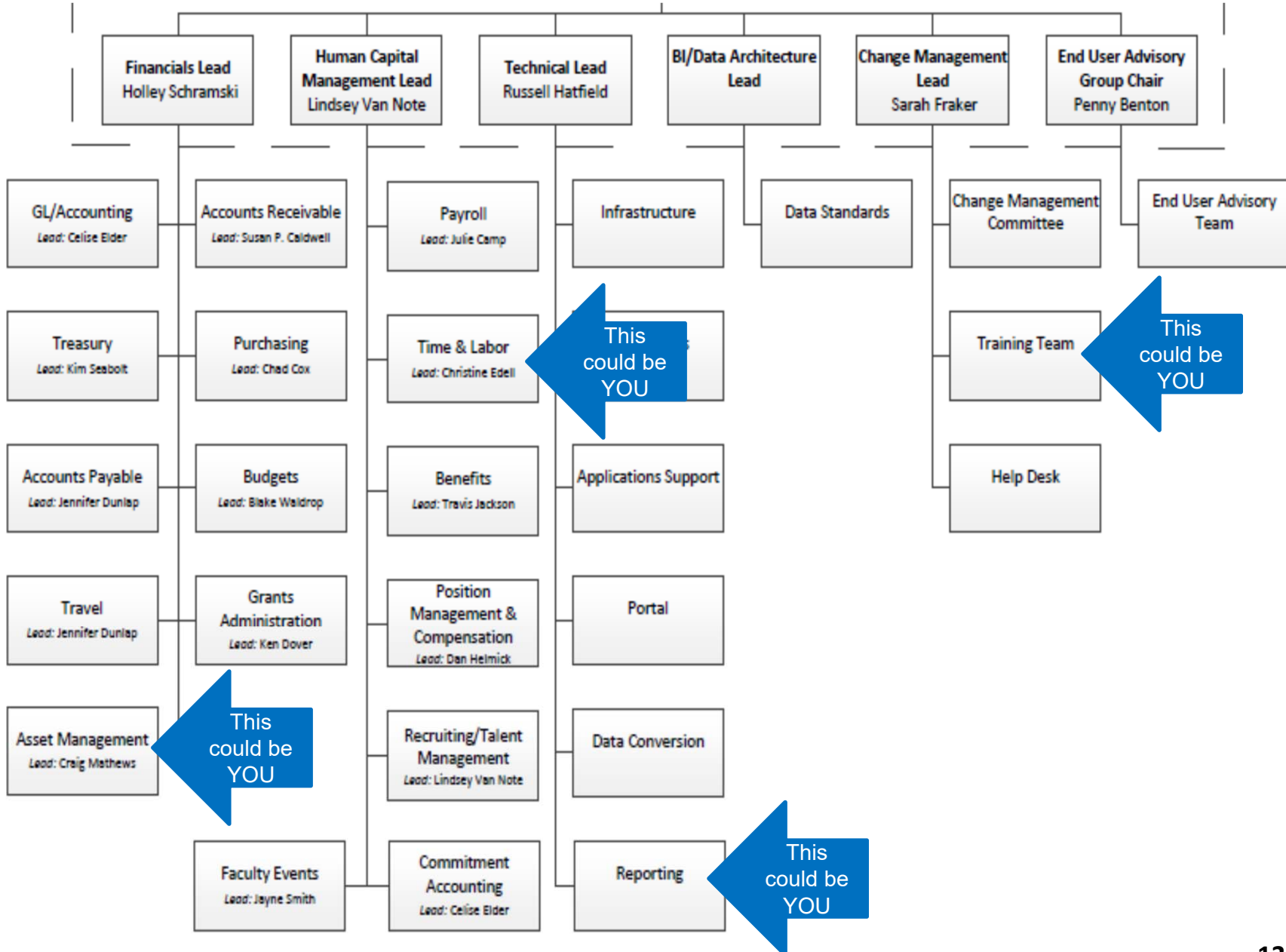
OneSource Project Governance

Executive Sponsors
President Morehead, Provost Whitten, & Vice President Nesbit

Chief Project Officer
Tim Chester

Communications
Lynn Wilson

Project Leadership Team
Tim Chester, Linda Fox, Juan Jarrett, David Lee, Chris Miller, Holley Schramski, & James Shore

Administrative Systems Advisory Committee (ASAC)
James Shore, Chair

Project Management Team
Lauren Holcomb, Michael Oldham, Tamara Morton

Project Director
Chris Wilkins

Implementation Leadership Team

Financials Lead
Holley Schramski

Human Capital Management Lead
Lindsey Van Note

Technical Lead
Russell Hatfield

BI/Data Architecture Lead

Change Management Lead
Sarah Fraker

End User Advisory Group Chair
Penny Benton

GL/Accounting — Lead: Celise Elder

Accounts Receivable — Lead: Susan P. Caldwell

Payroll — Lead: Julie Camp

Infrastructure

Data Standards

Change Management Committee

End User Advisory Team

Treasury — Lead: Kim Seabolt

Purchasing — Lead: Chad Cox

Time & Labor — Lead: Christine Edell

Integrations

Training Team

Accounts Payable — Lead: Jennifer Dunlap

Budgets — Lead: Blake Waldrop

Benefits — Lead: Travis Jackson

Applications Support

Help Desk

Travel — Lead: Jennifer Dunlap

Grants Administration — Lead: Ken Dover

Position Management & Compensation — Lead: Dan Helmick

Portal

Asset Management — Lead: Craig Mathews

Recruiting/Talent Management — Lead: Lindsey Van Note

Data Conversion

Faculty Events — Lead: Jayne Smith

Commitment Accounting — Lead: Celise Elder

Reporting

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Get Involved - Participation Survey

bit.ly/partweb

- Please forward the survey to interested parties

- Distributed via:

- Admin Memo

- Business Listserv, HR Listserv, IT Managers

- Already using to build targeted audiences

Partners and Consultants

- **OneUSG Project Team**
  - **University System of Georgia**

- **PeopleSoft Project Management Partner**
  - Navigator Management Partners

- **PeopleSoft Implementation Partner**
  - Sierra-Cedar, Inc.

All current systems and business processes

utilized in Financial & HR processing at the University

are within the scope of the project

HR & Payroll Partnership with USG **oneusg**

Reporting

FINANCE UGA only OneSource

Business Solutions

HR & Payroll Partnership with USG **one**usg

- **All 29 USG Academic Institutions under one umbrella**
- one set of uniform business procedures, policies and practices
- one technical platform / software solution
- one support team and service center
- one approach to solution delivery
- one source of data
- one governing structure
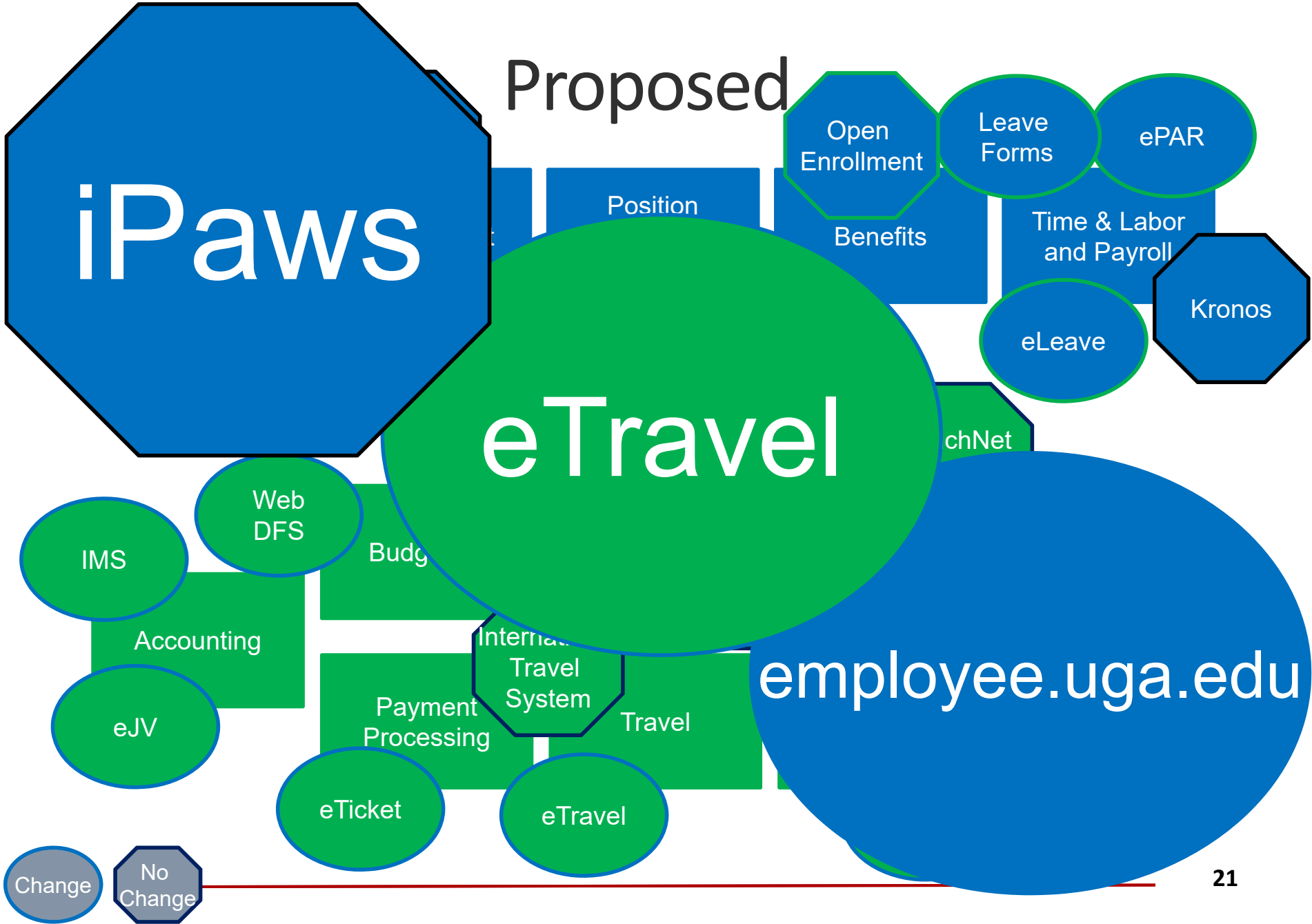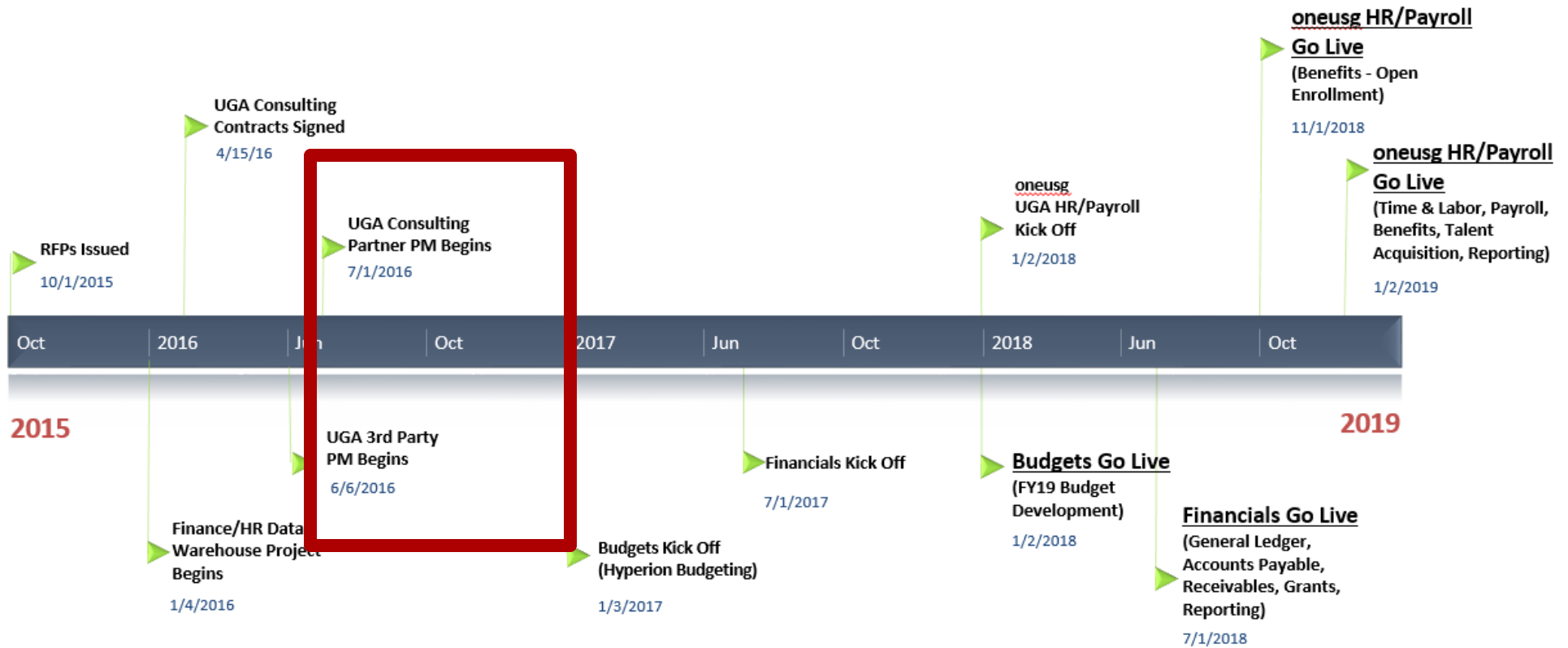- one set of vendors for service offerings

HR

Reporting

FINANCE

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Business Processes

HR Administration	Recruitment	Position Management, Staff & Faculty	Benefits	Time & Labor and Payroll

Reporting

	Budgeting	Grants Accounting	Accounts Receivable
Accounting	Payment Processing	Travel	Asset Management

Purchasing

Proposed

Proposed

iPaws

Position

Open Enrollment

Benefits

Leave Forms

ePAR

Time & Labor and Payroll

Kronos

eTravel

eLeave

chNet

Web DFS

IMS

Budg...

Accounting

International Travel System

employee.uga.edu

eJV

Payment Processing

Travel

eTicket

eTravel

Change

No Change

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USG Chart of Accounts

- **Today:** Account and Object Code
  - **Ex. 1011GH196000 - 71400**

- **2018:** Chart string with multiple segments
  - Much longer string is summarized by a "Speed Type"
  - Object Code -> Account Code, one digit longer
  - Change in Department Numbers

OneSource Project Timeline

oneusg HR/Payroll Go Live (Benefits - Open Enrollment)
11/1/2018

oneusg HR/Payroll Go Live (Time & Labor, Payroll, Benefits, Talent Acquisition, Reporting)
1/2/2019

UGA Consulting Contracts Signed
4/15/16

UGA Consulting Partner PM Begins
7/1/2016

oneusg UGA HR/Payroll Kick Off
1/2/2018

RFPs Issued
10/1/2015

| Oct | 2016 | Jun | Oct | 2017 | Jun | Oct | 2018 | Jun | Oct |

2015

2019

UGA 3rd Party PM Begins
6/6/2016

Financials Kick Off
7/1/2017

Budgets Go Live (FY19 Budget Development)
1/2/2018

Finance/HR Data Warehouse Project Begins
1/4/2016

Budgets Kick Off (Hyperion Budgeting)
1/3/2017

Financials Go Live (General Ledger, Accounts Payable, Receivables, Grants, Reporting)
7/1/2018

Fall Communications

- May – July: BSAG; Grants Focus; General Session
- August - Sept: ITMF/UGANet; Griffin and Tifton; Staff Council
- November 8 - Town Hall

- Project Overview Brochure
- Columns article
- Project Events

- Participation Survey
- Project Listserv

Fall Discovery Sessions

- Huron Assessment: Key Integration Points Between Click (eResearch Portal) and PeopleSoft Grants
  - Final Report August 23
- Financial Discovery in two areas:
  - Procurement Scope – use of SciQuest (UGAmart) – early Sept
  - Chart of Accounts – Finalize Working Version – Oct 3
- Business Intelligence discovery
- IT infrastructure decisions and buildout
- Human Capital Management – OneUSG discovery sessions for Research / Land Grant needs

Chart Of Accounts Information

Website Resources:

- http://onesource.uga.edu/news/UGA-Chart-of-Accounts/
- Presentation Slides, Conversion Tool, COA listings

Public Forum September 13th

- OneSource Calendar Events
    - Available via Collaborate
    - 2 week comment period
    - Survey for feedback
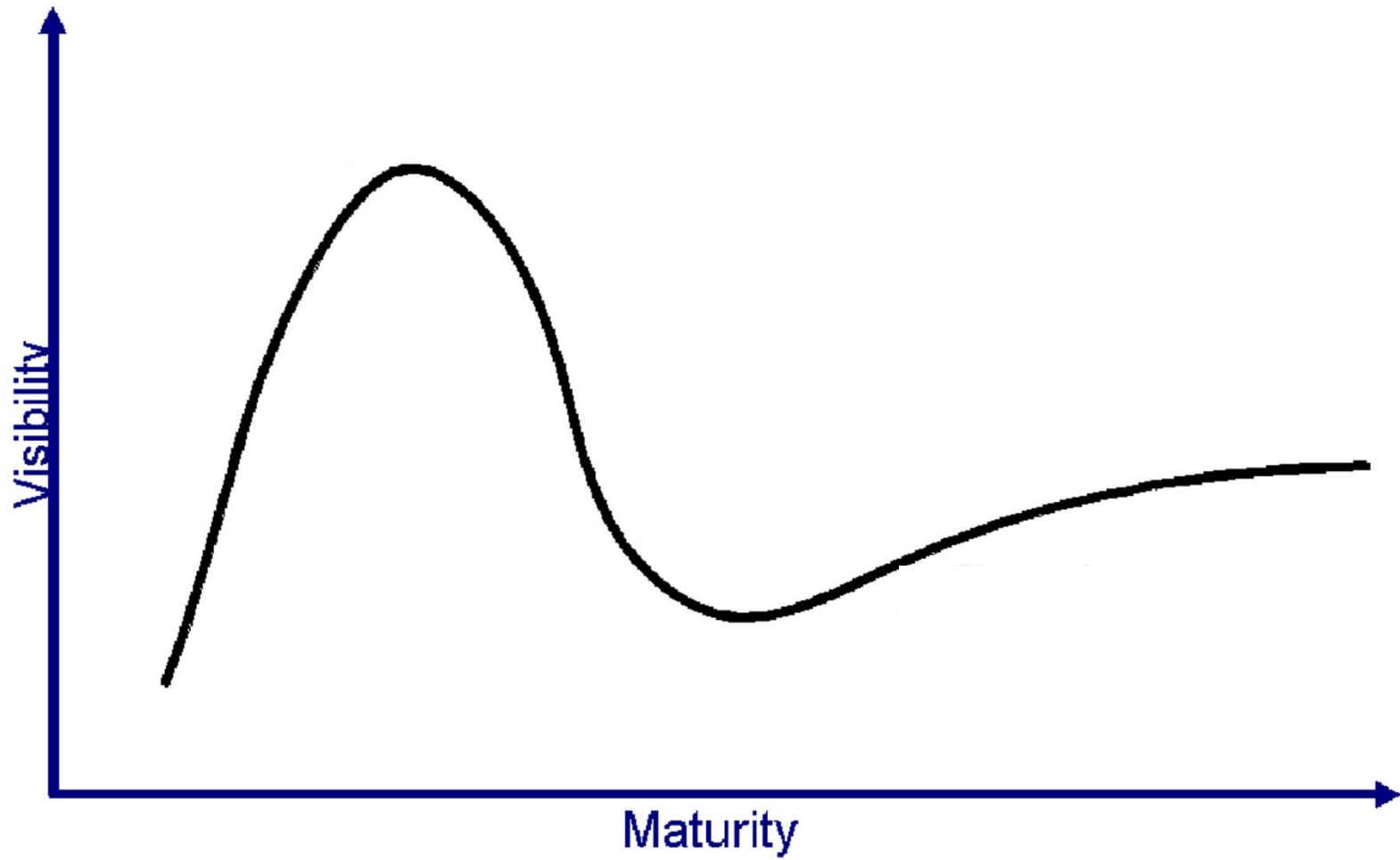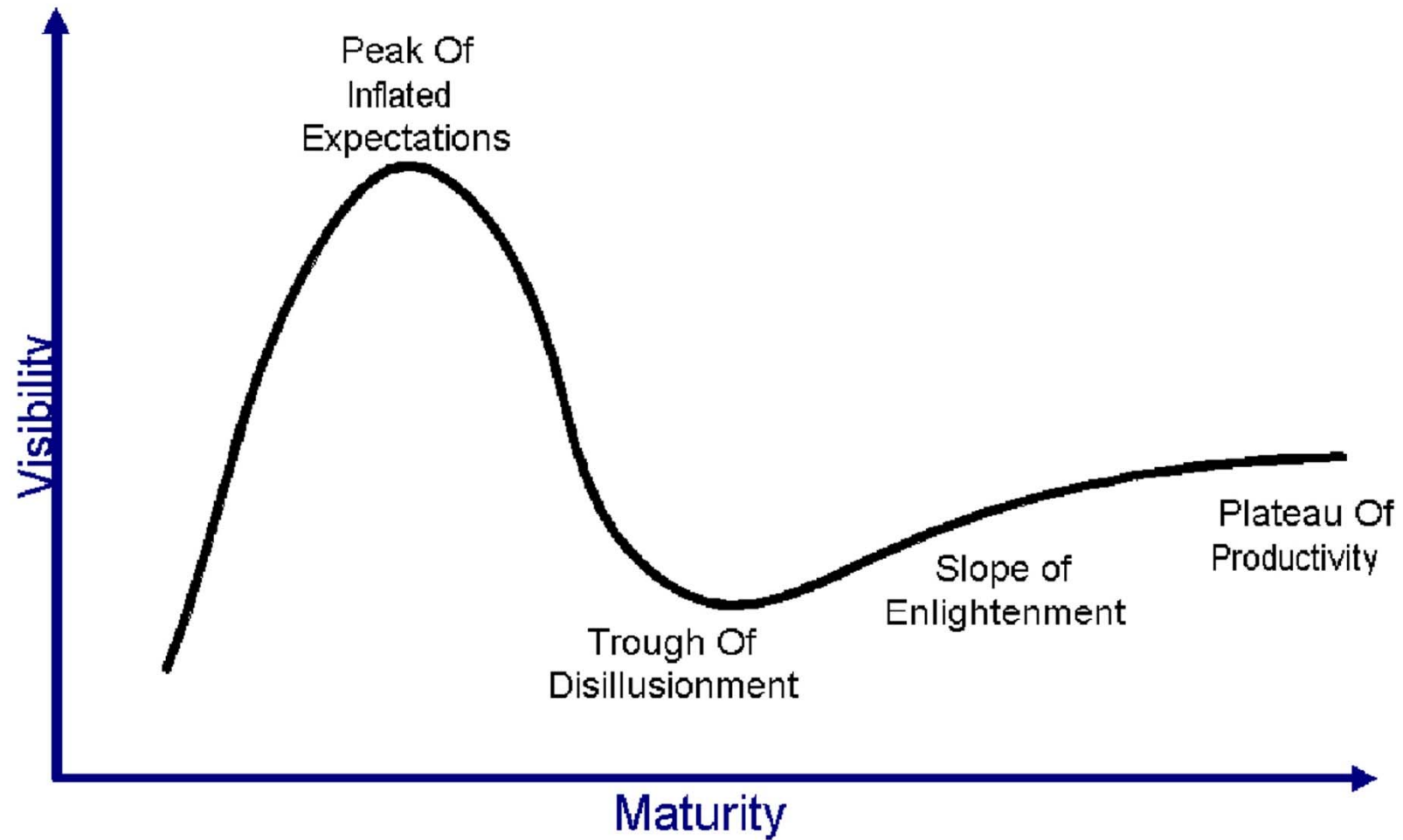
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Q&A

Participation Survey

bit.ly/partweb

Project Feedback

onesource.uga.edu

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Project Director

Chris Wilkins

chris.wilkins@uga.edu