OneSource

OneSource 101
UGA Financial Management System

OneSource
UNIVERSITY OF GEORGIA

website: onesource.uga.edu
email: onesource@uga.edu
service desk: 706-542-0202

Thanks to you

- Over 700 individuals from the UGA Community!
  - Working team members
  - Project team members
  - Central UBAS and Budget Offices
  - UAT Testers
  - Change Champions
  - Project Coordinators
  - Training Teams

What to expect: Times

- Start
  - Section 1
  - Questions
- 15 minute break
  - Section 2
  - Questions

- Questions are welcome
  - Send detailed questions to onesource@uga.edu

What to expect: Topics

- Section 1

  - Systems and functionality changing (employees)
  - Getting ready
  - Learning Resources

What to expect: Topics

- Section 2

  - Systems and functionality changing (practitioners)
  - Chart of Account changes
  - Split Implementation (July to Dec 2018)

What to expect: Not covered

- In Depth Details
- Step-by-step how-tos

- December 2018: OneUSG Connect for HR/Payroll
- Foundation systems: OneSolution and GAIL

Overview

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What is OneSource?

Business transformations across Finance and HR

• Budget Management System (Jan/July 2018)

• **Financial Management System (July 2018)**

• HR/Payroll System (December 2018)

• Budget Development (Spring 2019)

OneSource: UGA Financial Management System

- **Allows UGA to manage complex financial data**
  - UGA expenses in FY17 were almost ~ $1.6 Billion dollars

- **Used by all USG Schools**

- **Open to all 20,000 UGA Employees**
  - Less systems to login to
  - Increased visibility on transactions
  - Browser based and uses MyID and Archpass security

Who will use this system?

- **Practitioners:**
  - Perform Business/Financial responsibilities and duties

- **Employees:**
  - Request travel authorizations or reimbursement for travel or other expenses

- **Managers and Supervisors:**
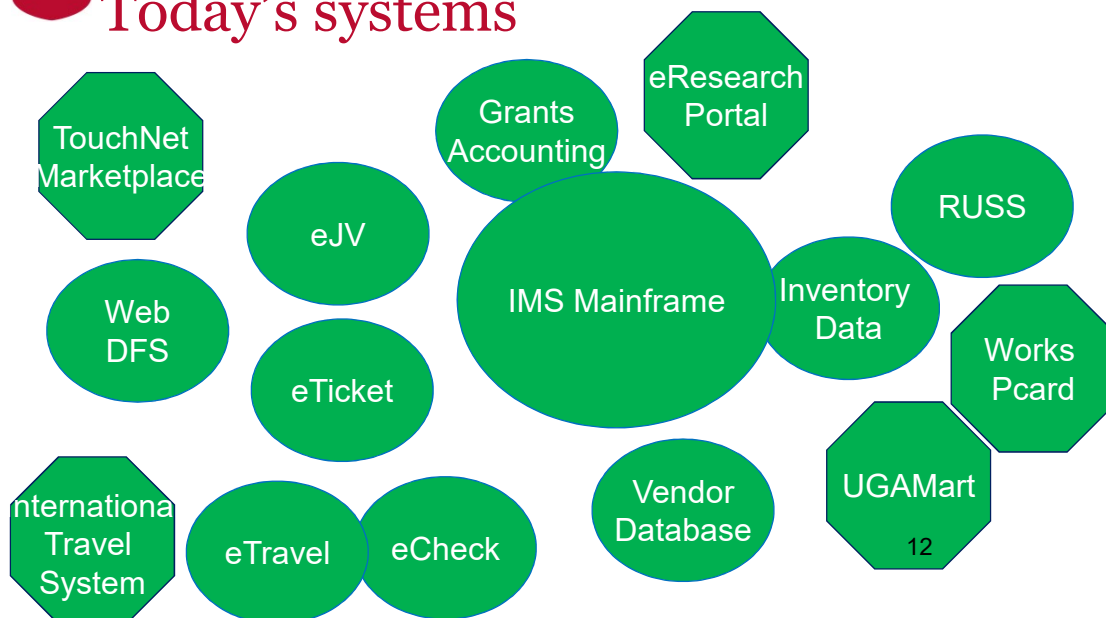 - Approve Travel and Travel expenses
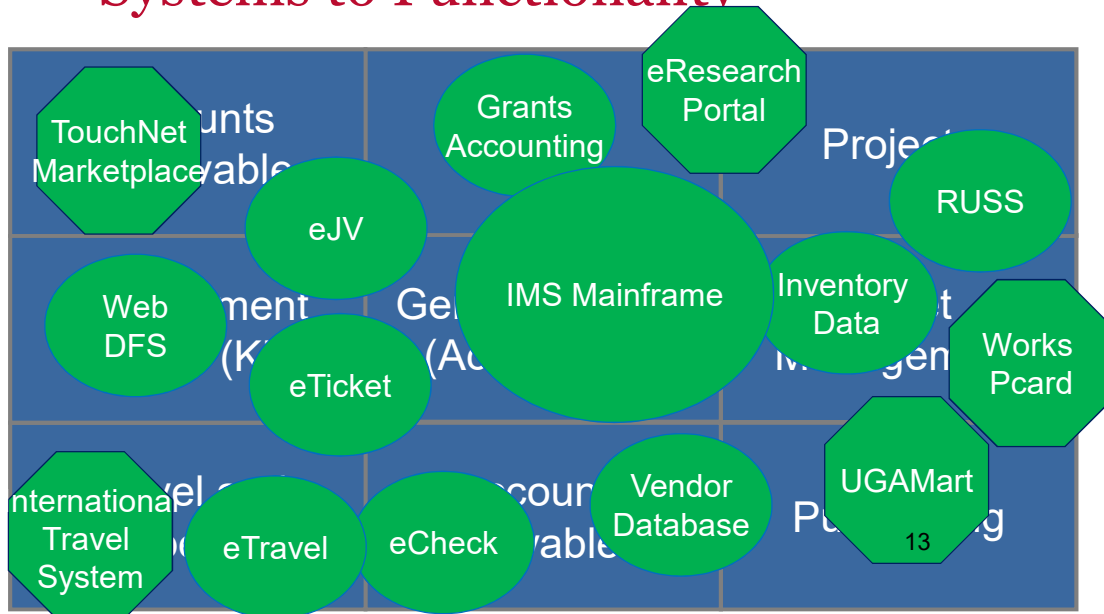
Functionality

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Today's systems

eResearch Portal

Grants Accounting

TouchNet Marketplace

eJV

RUSS

Web DFS

IMS Mainframe

Inventory Data

eTicket

Works Pcard

International Travel System

eTravel

eCheck

Vendor Database

UGAMart

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Systems to Functionality

TouchNet Marketplace

Accounts Receivable

Grants Accounting

eResearch Portal

Projects

RUSS

eJV

Web DFS

Commitment (KK)

General (Accounting)

IMS Mainframe

Inventory Data

Asset Management

Works Pcard

eTicket

International Travel System

eTravel

eCheck

Accounts Payable

Vendor Database

UGAMart

Purchasing

13

Integrated functionality

Accounts Receivable (AR)	Grants	Projects
Commitment Control (KK) Budgets	General Ledger (Accounting)	Asset Management (AM)
Travel and Expense	Accounts Payable	Purchasing

Integrated functionality

HomePage: Employee Self Service
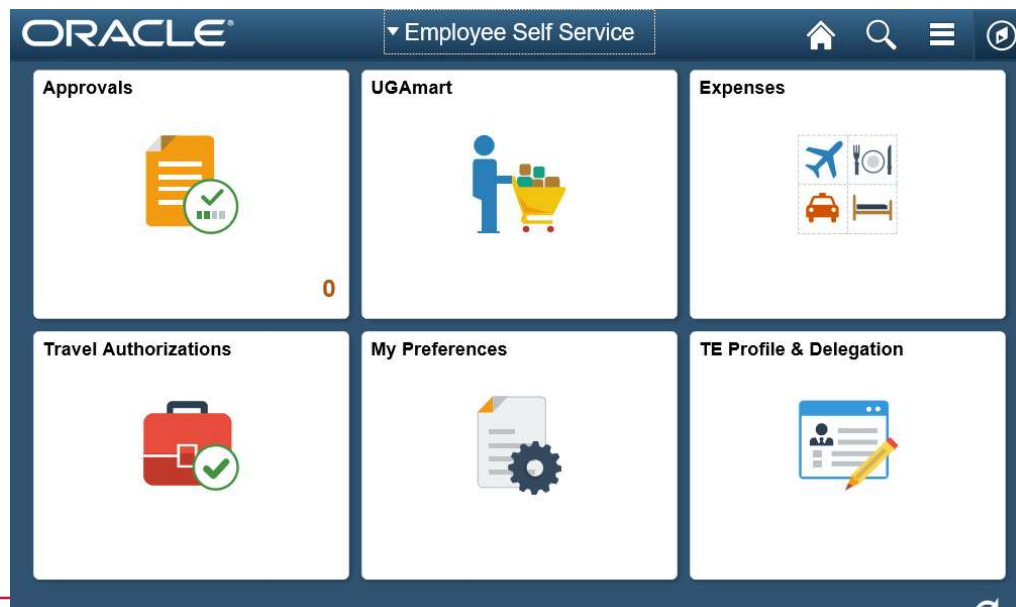
HomePage: UGA Financials

Areas of functionality

- UGA Financial Management System
  - Financials / Oracle / PeopleSoft (PS)
- Asset Management (AM): Property Control
- Accounts Payable (AP): Payments to suppliers (vendors)
- Accounts Receivable (AR/BI): Customer billing and payments
- Commitment Control (KK): Budget transactions
- General Ledger (GL) : Accounting transactions
- Travel & Expenses (TE) : Payments to employees
- Projects and Grants (PC & GM): Capital and Sponsored Projects
- Procurement module (not visible to most departments)
  - We will continue with UGAMart for Procurement activities

All Employees

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Basic Distributed Roles

Role Name	Functionality
All Employees (Default role)	• Initiate Travel, Expenses, Payment Requests, Assign or Accept Delegates
Approvers (Set by HR data)	• "Reports-To" Supervisors approve travel for their own employees
View Only (must be requested)	• Defined Business Purpose to review data and transactions in the system. Commonly used for PIs, Analysts, etc.

Travel Authorizations: TAs (TE)

- Permission for employee travel
- Employees can assign delegates who can start and edit "on their behalf", including accounting information
- Submitted by traveler or delegate
- **Cannot be entered after travel dates**
- **No longer encumbers funds (no AP approval)**

- Approved by **Reports-To (Supervisor)** and Distributed Expense Approver, Central Offices (OIE and SPA if needed)
- **Changes needed? Comes back to traveler**

eTravel Authorities

Travel Authorizations

Expenses (TE)

- Employee reimbursements (travel/other)
- Employees can assign delegates who can start and edit "on their behalf", including accounting information
- **Employees must submit their own**
- Upload pictures of receipts to MyWallet
- **Can see progress of requests**

- Approved by **Reports-To (Supervisor)** for travel only and Distributed Expense Approver, Central Offices
- **Changes needed? Comes back to traveler**

eCheck to Employees

Expenses

Payment Request Center (AP)

- Payments to Suppliers
- Any employee can submit, will need to enter detailed invoice information and Accounting Information
- Once approved, becomes a Voucher

- Approved through Distributed Spend Approvers then Central Offices
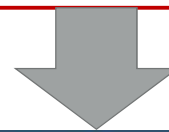- **Changes needed? Comes back to Initiator**

eCheck to Vendors
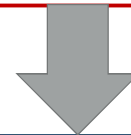
Payment Request Center

Supplier Records (AP)

- Supplier (vendor) details stored and managed
- View only access

- Suppliers self-register through web page, just like today
- Used in Payment Requests
- Used in UGAmart

Vendor Database (UVDB)

Accounts Payable

What you need to know: Employee

- How to submit TAs and reimbursable Expenses

- How to assign delegates (if provided)

- How to enter travel details
- How to upload attachments
- Accounting information from your Department

| Initiator/ Employee | (Reports-To Supervisor) | Fiscal Approvers | Central Offices |

Distributed Approvers: Reports-To (Supervisor) Approvers & Fiscal Approvers

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Distributed Approvers: Reports-To

(Supervisors and Managers): the individual that the Traveler "reports to"

- Auto-assigned from HR Data (iPaws/Faculty Jobs)
- Approve Travel related items only
- Approval to Travel
- Dates, locations, details
- Appropriate expenses, eligible for reimbursement

Distributed Approvers: Expense, Spend, Journal

- Fiscal/Business
  - Assigned by Departments/Units
  - Accounting information
  - Within policy guidelines
  - Appropriate and accurate

- Expense Approvers – approve all Travel Authorities and Expenses (travel and non-travel)
- Spend Approvers – approve Payment Requests and JVs
- Journal Approvers – approve Journals and Budget Journals

Approvers: What you may need to know

- How to view approvals
  - Email notifications
  - Worklist in Employee Self Service
- How to view details
- What actions to take
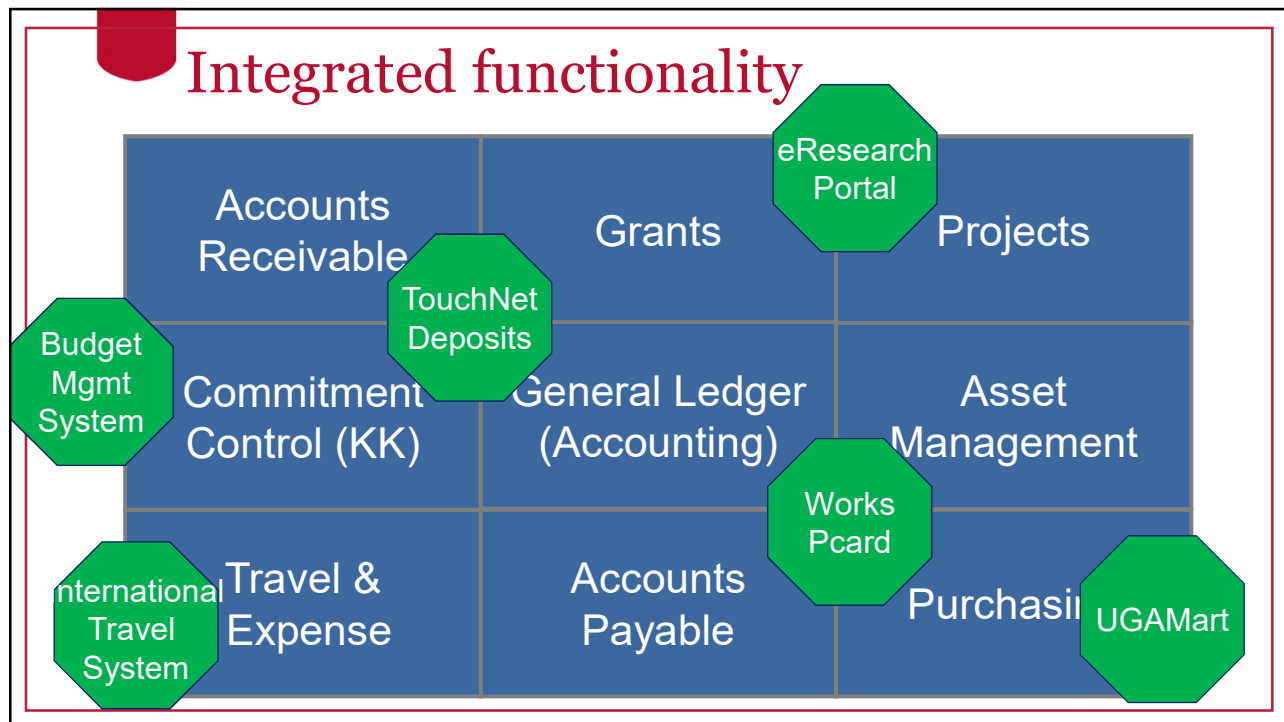 - Hold
  - Approve
  - Deny or Pushback

Systems Changing and Associated Systems

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Integrated functionality

Accounts Receivable	Grants	Projects
Commitment Control (KK)	General Ledger (Accounting)	Asset Management
Travel & Expense	Accounts Payable	Purchasing

(eResearch Portal)
(TouchNet Deposits)
(Budget Mgmt System)
(Works Pcard)
(International Travel System)
(UGAMart)

UGAmart

UGAMart

Shoppers: No significant changes

• Remains as the primary system for Purchase Requests, Purchase Orders and various approvals such as CESS

Requisitioners/Approvers:
• New Chart of Accounts (COA) is enabled in UGAmart
• Approvers assigned based on new COA Departments

Works/Pcard (Bank of America)

Works
Pcard

Cardholders, Approvers & Facilitators:

- New Chart of Accounts (COA) is enabled in Works through SpeedTypes ONLY
- Also requires Account Code (Object Code)

- Works will remain the primary system for Pcard transactions and edits

- Speedtypes used for Works have Required fields: Fund, Program, Class and Department ID, can include optional chart fields

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UGA Budget Management System

Budget
Management
System

Practitioners:

- Reporting to view original budget, amendments, actuals, and encumbrances data
- One method to prepare Budget Journals (BAs) for Financials
- Used for forecasting and planning (What-if scenarios)
- SmartView: Excel Add-in to see and manipulate data

- Budget Development (Spring 2019 for FY2020)

Deposit transmittals (TouchNet)

TouchNet Deposits

Practitioners:

- Deposit transmittals created in TouchNet, (Bursar's Office)
- Allow deposits to be accepted and transmitted to Financials
- Credit Card, Cash and Check deposits
- Uses TouchNet Detail Codes (like Speedtypes)
  - Required fields include Fund, Class, Department ID and Account Code
- Employees completing deposits will need to be granted a TouchNet User ID and Password

Other Associated Systems

- Keep:
  - International Travel Registry (OIE)

- Integrate:
  - eResearch Portal
  - AIM (FMD system)
  - Elements (Dec 2018)

Systems retiring:

Complete listing:

https://onesource.uga.edu/resources/system_changes

- ePAR (no monthly certifications)
- IMS/Mainframe (no new fiscal/financial info)
- Arrow/QMF (no new fiscal/financial reporting)
- WebDFS (no Budget Amendments, no Departmental Accounting)

Reporting and Visibility

Visibility:
- Employees can see status of their reimbursement requests
- In most cases, practitioner data is not restricted by department

Depending on the report, may be available in one or more places:

Queries and Reports in UGA Financial Management
Reports in new Data Warehouse
Queries in Simpler
Reporting in UGA Budget Management System
Excel add in for SmartView access

Logging In and Security

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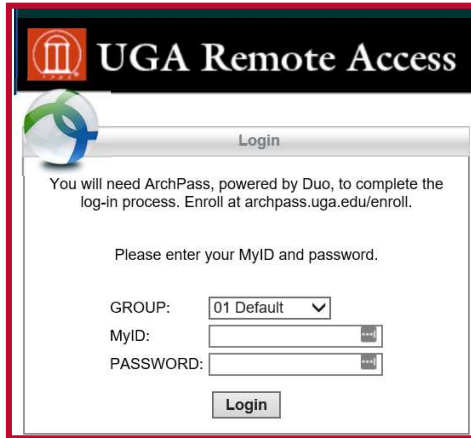
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Security: from Trusted Devices
Logging into Financials

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Central Authentication Service

Username:

Password:

LOGIN   CLEAR

Trouble logging in?

About CAS | About Us

Multifactor Authentication is in progress...

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Device: Android (XXX-XXX-3829) ▾

Send Me a Push

Call Me
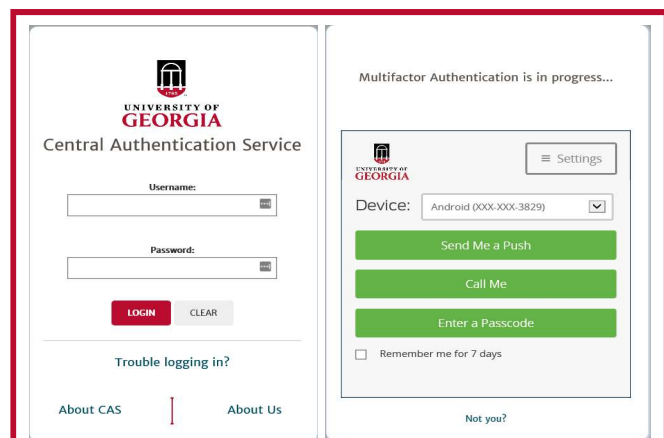
Enter a Passcode

☐ Remember me for 7 days

Not you?

**MyID
&
Archpass**

Security: from Remote or Public Networks
VPN + Financials

VPN: MyID & Archpass + **Financials: MyID & Archpass**

Security: Phones
VPN and Logging into Financials

Cisco AnyConnect VPN App + **Financials**

Phones: Mobile friendly webpages

What To Do Now

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Communicating Locally

- Spread the word to Employees
  - Let them know about functionality
  - Let them know about learning opportunities
- Talk about changes to internal processes
  - Ex. Departmental Travel Forms
- Individuals that have been involved on the project:
  - Project Coordinators
  - Change Champions
  - Gurus

Preparing for July 2

- Enable Archpass Duo (if you haven't already)
- Install VPN (if you'll be on public networks)
  - Laptop or tablet
  - Phone
- Review the Training Library for Walkthroughs
- Attend additional training (if applicable)
- Identify Delegates (if applicable)

Usability Tips and Tricks

- Turn off your pop up blocker 1st time you login
- Do not use the Microsoft Edge Browser

- Can be logged in twice
- Clearing the cache (browser specific)
- [Technical Resources](#) page

Getting Help: login and security

- Archpass Duo and VPN support
- MyID password resets

- EITS HelpDesk
  - helpdesk@uga.edu
  - 706-542-3106

Getting Help: using the system

- OneSource webpage http://onesource.uga.edu

- OneSource Service Desk
  - Email onesource@uga.edu
  - Phone 706-542-0202
  - Hours: 8-5pm M-F

Learning Opportunities and Training

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# Learning Opportunities at onesource.uga.edu

- Classes
  - In Depth for Practitioners
  - Short courses for users with limited tasks
  - Self-service formats
- Class formats
  - Recorded/Self Service
  - Interactive Webinar
  - In Person
  - Workshops

Learning Opportunities at onesource.uga.edu

- Resources Web Pages
  - By Topic
  - Recorded sessions and forums
  - Documentation

Resources

- OneSource Training Library
  - Self-service Walkthroughs and "hands on" learning
  - Documentation and Job Aids

Learning Opportunities: Training Library
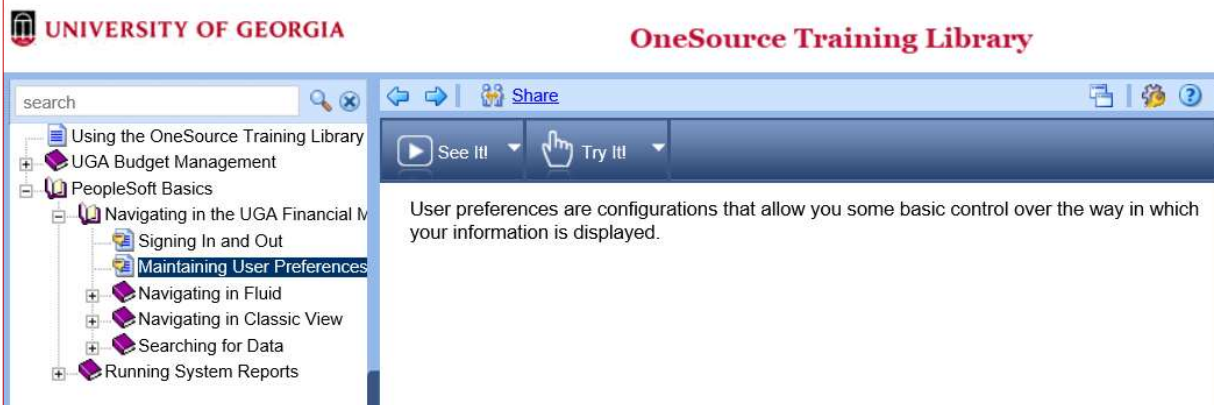
Using OneSource Training Library

Example:
Walk through setting up a delegate

How to use the walkthroughs:
  See It plays as a video and lets you pause.
  Try It lets you click on icons, type in text, etc.
  (if you get stuck, just hit Enter)

Allows for a "hands on" experience without logging in

Setting expectations

- Everyone is new to this system at the same time.

- Any employee who will be using the new systems will need time for training and a learning curve.

- Internally, you may need to set expectations for initial delays.

- Despite the best planning, there will be hiccups. Let's be patient with each other.

- Understand that it will take time to return to a comfort level.

What to expect: Topics

- After the break
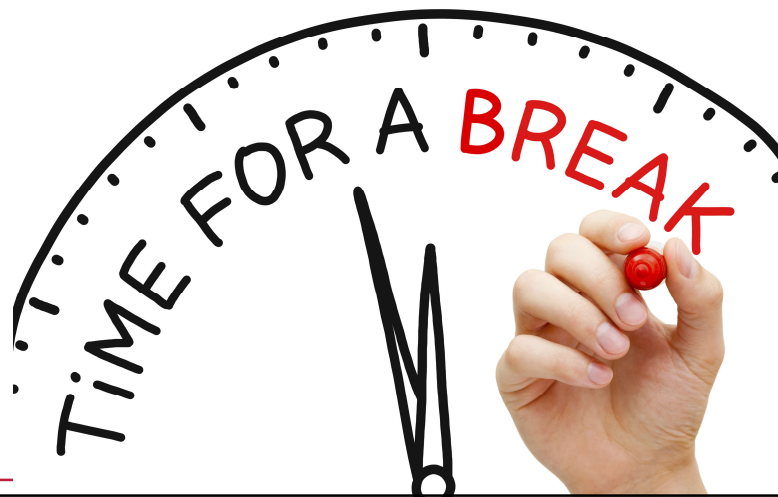
  Systems and functionality changing (practitioners)

  Chart of Account changes

  Split Implementation (July to Dec 2018)

Questions

Break

What to expect: Topics

- Section 2

    - Systems and functionality changing (practitioners)
    - Chart of Account changes
    - Split Implementation (July to Dec 2018)

Specialized Roles
Financial Practitioners

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HomePage: UGA Financials

Journal Vouchers vs. Journals

Journal Vouchers (AP)

• Vouchers are records of payments to Suppliers from Accounts Payable

Journals (GL)

• Journals are records of accounting transactions and direct charges

Journal Vouchers (AP)

eJV (partial)

Accounts Payable

- Journal Vouchers (JVs) allow adjustments against Vouchers
  - Payment Requests
  - POs from UGAMart
- After payment has happened
- Adjust in AP, where it originated

- Approved by Distributed Spend Approvers then Central Offices

General Ledger (Accounting): Journals 1

- Journals exist in the General Ledger (master record of all Accounting Transactions)
- Journals cannot be modified but additional transactions can be added to "balance or adjust" original Journals

- Approved through Distributed Journal Approvers then Central Offices
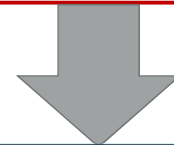
- eJV (partial)
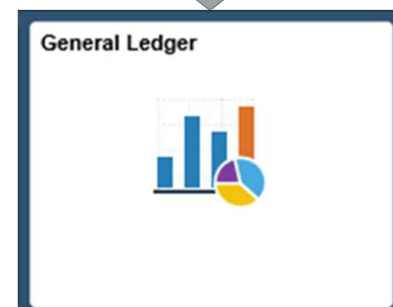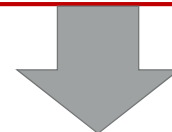
General Ledger

General Ledger (Accounting): Journals 2

- Journals exist in the General Ledger (master record of all Accounting Transactions)
- Service Departments initiate transactions to be approved by Paying Departments
  - Ex. GA Center charges for catering

- Approved through Distributed Journal Approvers then Central Offices

- Replaces eTicket

General Ledger
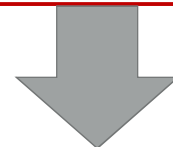
General Ledger (Accounting): Journals 3

- Journals exist in the General Ledger (master record of all Accounting Transactions)
- Ex.
  - PCard Charges
  - Work orders from FMD
  - Telephone Charges
  - Campus Mail Charges

- Do not flow through Distributed Approvers

- Direct Charges
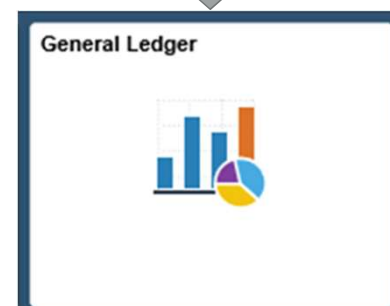
General Ledger

General Ledger: Commitment Control (Budgets)

- Budget Journals (new funds) and Budget Transfers (transfers)

- Personnel documents will not require Budget Amendments after July 1. (Personnel budgets are not maintained per position.)

- In general, budget checking happens at a higher level , most often by fund and department level, not at the detail account code (object code) level.

- Approved through Distributed Journal Approvers then Central Offices

WebDFS Budget Amendments

General Ledger
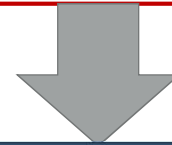
Review: Journal Vouchers vs. Journals

Journal Vouchers (AP)

- Adjust Vouchers in AP (partial eJV replacement)

Journals (GL & KK)

- Entries from other functional areas
- Direct Charges like Campus Mail, Pcard charges
- Adjustments to other Journals (partial eJV replacement)
- Replace eTicket ("charges" to internal customers)
- Budget Journals & Budget Transfers (replace BAs)

Accounts Receivable/Billing

- UGA will gradually adopt this functionality in groups or cohorts
- Only used for external customers
- Enables recording and management of Accounts Receivables amounts
- Enables creation of Billing Invoices that integrate with Accounts Receivable
- These have been managed mostly in local departmental systems instead of in a central system

New functionality for departmental users

Receivables
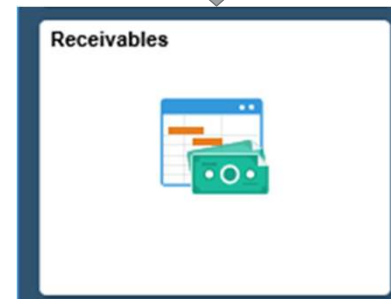
Asset Management (Property Control)

- Use to record location and custodian information
- Data will be converted
- **Distributed units can edit the custodial information for ANY record (high responsibility)**
  - Record transfers of equipment from one unit to another (changing custodial chart string)
  - Record off-campus use and custodian (user) information
- Increased visibility to historical changes
- No entry by users (not like RUSS)
- No approvals

RUSS
Property Control database

Asset Management
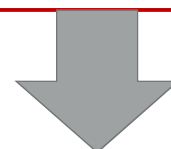
Projects

- Set up specific projects that require restrictive budgets, may have a project team or start and end dates, etc.
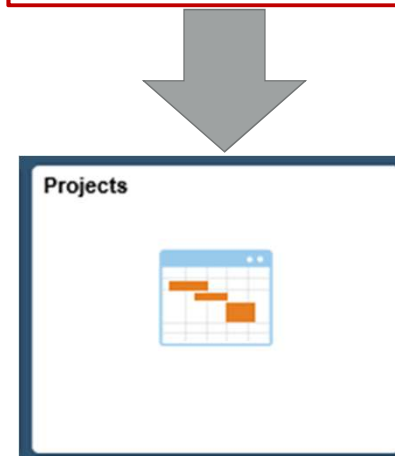- Used for Study Abroad and Field Studies
- Used for Capital Projects
- Can be used by Distributed Departments for non-capital projects

New functionality

Projects

Grants (Suite)

- Integrates with Projects and AR/BI
- Integrates with the eResearch Grants Portal for funded projects and grants
- Set up project budgets to restrict and track budgets and spending
- Contains contract terms
- Current Grants will be converted (totals only by account code (detail object code))

Grants Accounting on Mainframe (IMS)

Grants

Projects

Receivables
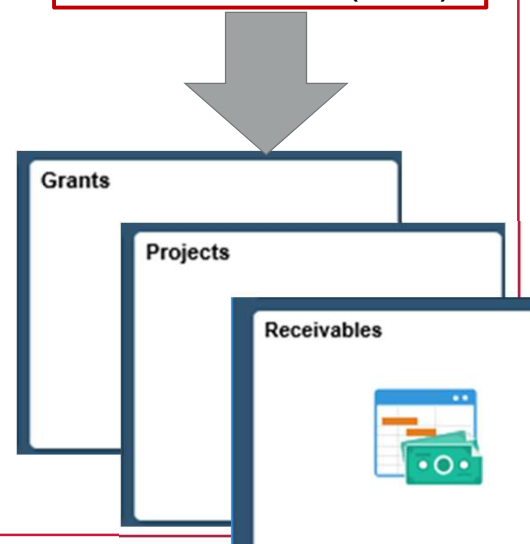
Integrated Functionality Flow Example

- UGAmart (PR)
- Commitment Control (Budget Checks)
- UGAmart (PO)
- Procurement (open PO)
- Commitment Control (Encumbrance)
- UGAmart (Invoice and Receipt)
- Procurement (adjust PO)
- Accounts Payable (Voucher & payment)
- General Ledger (accounting record)
- Commitment Control (adjust encumbrance)
- Asset Management (record of asset)

Chart of Accounts

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Basic COA Changes

- For Financials:
  - Current Department Numbers will be retired
  - Current Account numbers will be retired (ex. 1011GH196000)
  - Still used for Payroll until Dec 2018
- Chart Strings have "shortcuts" for entry called SpeedTypes or Accounting Tags
- Chart Fields will be used in combinations called Chart Strings

- Account Numbers
- Object Codes
- Department Numbers

- SpeedTypes
- Accounting Tags
- Chart Fields
- Chart Strings

Chart of Accounts: UGA

- Today's Chart of Accounts:

  10-11-GH-196-000

- Each piece means something

Chart of Accounts: USG

- Tomorrow's Chart of Accounts:

  10500 11100 11800 20961000

- Each piece means something

Chart Fields: 1011GH196000

| CURRENT		NEW
Fund	10	Fund
Function	11	Program
Operation	G	Class
Activity	H	n/a
Department	196	Department
n/a		Operating Unit (optional) ChartField 1 (optional)
Project	000	Project (if needed)

Current Account Numbers

Made of Chart Fields, glued together

Ex:
FUND = Source of (General funds)
FUNCTION = In support of (Instruction)
DEPARTMENT = Who (Terry College)

Fund	Function	Operation	Activity	Dept	Project
10	11	G	H	196	000

Account Number
1011GH196000
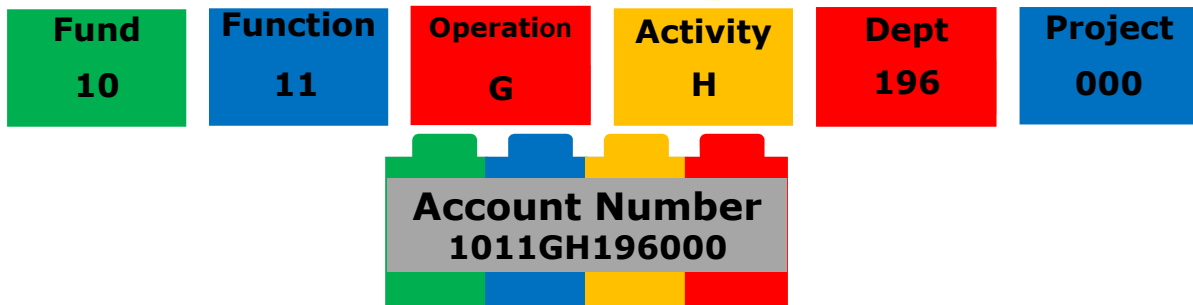
Current Account Numbers

Some Chart Fields are Independent

OBJECT CODE = What (Software)
FISCAL YEAR = When (which year)

Account Number
1011GH196000

Object Code
73300

Fiscal Year
FY18

New Chart Fields

All Chart Fields are independent

Fund

Program

Class

Department

Operating Unit

Project

PCBU

Budget Ref

Account Code

Chart Field 1

Activity ID
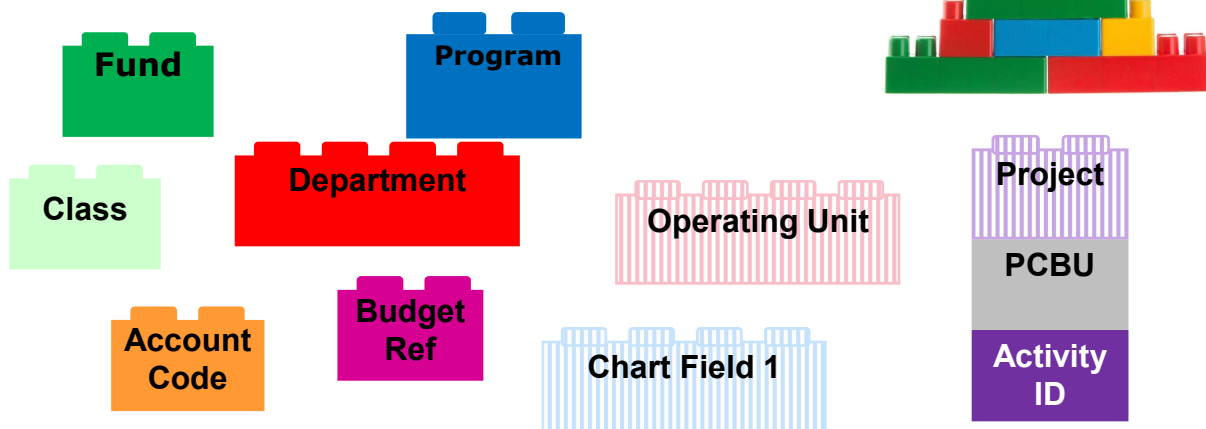
Building a Chart String

(Fund) = Source of = Tuition
(Program) = In Support of = Instruction
(Class) = Detailed Source of = Tuition (R1)
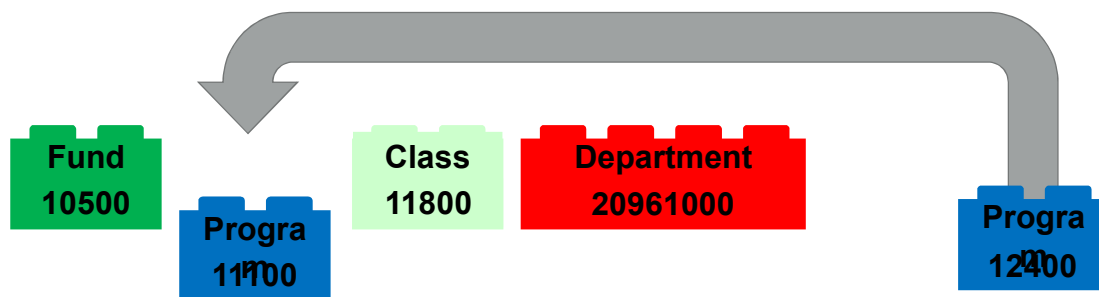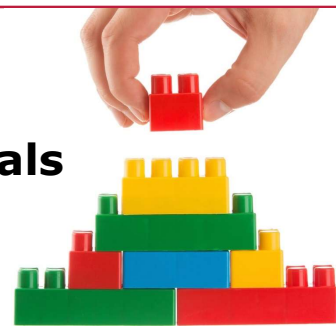**(Dept)** = Who = Terry College, Dean's Office

Fund
10500

Program
11100

Class
11800

Department
20961000

Entered independently in Financials

Building a Chart String

Changed Independently in Financials

Need to spend on Research?

Use Program 12400 instead

Fund 10500

Program 11700

Class 11800

Department 20961000

Program 12400

Speedtypes / Accounting Tags

Request for strings you use often
All of the building blocks will populate

Enter   20REALRSCH

Shows up as

Fund 10500

Program 12400

Class 11800

Department 20961000

Speedtypes / Accounting Tags

Speedtypes are not "remembered" by the system

Enter — 20REALRSCH

Shows up as
- Fund 10500
- Program 12400
- Class 11800
- Department 20961000

Edit in place
- Fund 10500
- Program 11100
- Class 11800
- Department 20961000
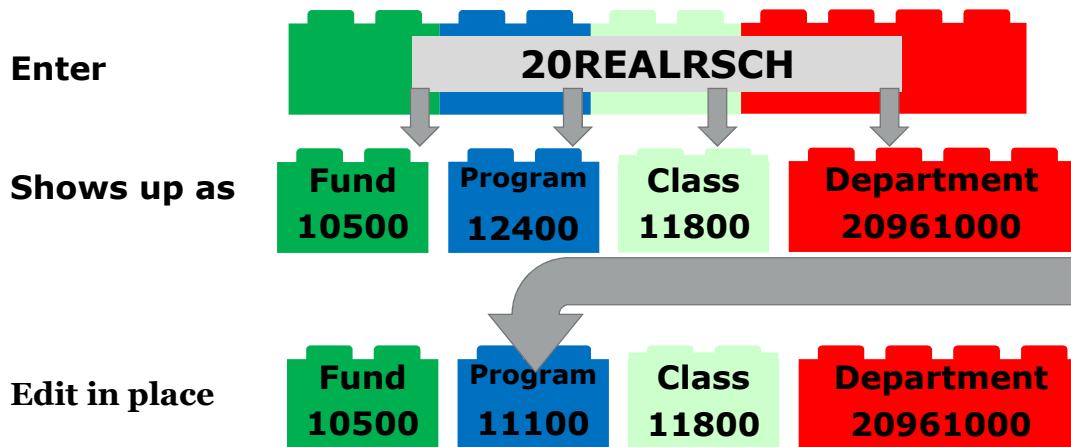
Chart String Additions

Account Codes (Object Codes)
Budget Reference (Fiscal Year)
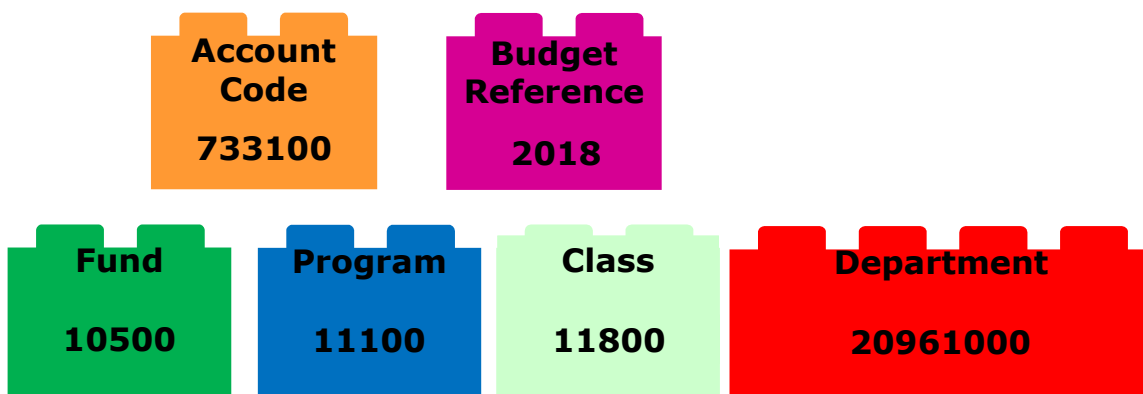
- Account Code 733100
- Budget Reference 2018

- Fund 10500
- Program 11100
- Class 11800
- Department 20961000

Ex: Accounting Tag in Payment Request

Accounting Tag	Accounting Details

grad × Q

Accounting Tag	Description
GRADSCH	Grad School Office
GRADUATEDIST	Graduate School Distributed Ta

Ex: Accounting Tag in Payment Request

Accounting Tag	Accounting Details

GRADSCH Q

Fund Code ◇	Program ◇	Department ◇	Class ◇
10600 Q	13100 Q	27002001 Q	11300

Things to consider

Since:
- Chart fields are independent
- Put together to build Chart Strings

Then:
- No need to "request" or "delete" a Chart String
- Chart Strings don't expire
- Chart Fields might be retired if no longer used

(Project Ids are not used after Project end dates)

Getting Started

Chart of Accounts Conversion Tool as "training wheels"

Chart of Accounts Conversion Tool				
1011GH196000	Search By UGA Account Number full or partial			
April 18, 2018 - 1 account returned.				
UGA Account Number	USG Fund	USG Program	USG Class	USG Department
1011GH196000	10500	11100	11800	20961000

Getting Started

COA Conversions also in **Simpler**

The University of Georgia — simpler/edu

Home > UGA Account Conversion

UGA Account Conversion

UGA Account Number: 1011GH196000 ✕

UGA Account Number	USG Fund	USG Program	USG Class	USG Department
1011GH196000	10500	11100	11800	20961000

COA Code Structure

Other Restricted

	Fund Group	Class
20000	Restricted and Sponsored Programs	61XXX Sponsored Federal 62XXX Sponsored State 625XX Sponsored State Other Than GA 63XXX Sponsored Local 64XXX Sponsored Private
20100	Student Financial Aid	61XXX Sponsored Federal 62XXX Sponsored State 625XX Sponsored State Other Than GA 63XXX Sponsored Local 64XXX Sponsored Private
20200	Restricted - Foundation	67XXX Foundation

COA Resources

Conversions only get you so far...
Use the Chart of Accounts Resource Page to find:

- **Full list of Chart Fields**
- **COA Code Structure (which fields can link together)**
- **SpeedType Reference Guide (use in Works, etc.)**
- **COA FAQ Document**
- **Link to Conversion Tool**
- **Conversion (Crosswalk) Spreadsheet**

Reporting

OneSource 101

OneSource
UNIVERSITY OF GEORGIA

website: onesource.uga.edu
email: onesource@uga.edu
service desk: 706-542-0202

Reporting: Today

Arrow	Payroll Reports (WebDFS)
Simpler	Cost Reports
QMF	Departmental Systems
ASRs	

Reporting: Tomorrow

Simpler: new and history

Data Warehouse: new and history

UGA Budget Management System

UGA Financial Management System:
    Queries
    Reports

Reporting: Example

PAR requirements are changing
    No need to certify monthly in ePAR

Data Warehouse will have a grants certification report
    Can review monthly
    Used yearly for certification
    Used at end of project for certification

Split Implementation: Reporting

- **Arrow, QMF, IMS, Simpler (legacy reports)**
  - For historical data and FY19 Payroll data
  - *FY19 budget and financial data will not be accurate*

- **Queries and reports in Financial Management System, Simpler (new reports), Data Warehouse, UGA Budget Management**
  - Will contain FY19 Financial Information

- **Ex. New Query in Financials**
  - Accounting team developing a query to verify payroll charges from legacy to PeopleSoft Finance during split implementation

Split Implementation:
July 1, 2018 -> December 15, 2018

Budgets:

- FY19 Budget development data converted to the new COA into Financials

HR/Payroll:

- Payroll will use current Account Numbers (Ex. 1011GH196000)
- Payroll and Time will be processed in current systems (WebDFS, Kronos, eLeave)
- WebDFS will be used only for positions and payroll data (no budget amendments)

Financials:

- UGA Financials Management System will use new COA. (Payroll charges will be converted by the system from Account Numbers to Chart Strings.)
- All budget journals will be entered in Financials

Split Implementation:
Payroll Changes/Exceptions

BUSINESS AS USUAL:

WebDFS documents used for position maintenance, pay authorization and payroll actions.

- BackPay > Add to prior payroll charges
- Payroll JVs > Adjust prior payroll charges if PAR does not exists.
- PAR Change > Adjust prior payroll charges if PAR exists.

  (PAR certification will not be required except when adjusting past payroll charges. Monthly employee notification will be turned off.)

Split Implementation: New "old" Accounts

- Grants that have payroll:
  - Created in Financials with budget on new COA
  - A new Account Number will also be created
    - This will enable payroll to process against the grant

Practitioner Courses

OneSource 101

OneSource
UNIVERSITY OF GEORGIA

website: onesource.uga.edu
email: onesource@uga.edu
service desk: 706-542-0202

Practitioner Courses:

- Basics in the OneSource Library
- OneSource 101 (Financials)

- Travel and Expense
  - Travel Authorities and Reimbursement
  - Travel and Expense Workshop

Practitioner Courses:

- Accounts Payable
  - Accounts Payable-Payment Request and JVs
  - Accounts Payable Workshop

- General Ledger
  - General Ledger (General Ledger Journals)
  - General Ledger (Budget Journals)

- Budgeting - UGA Budget Management System

Practitioner Courses:

- TouchNet for Departmental Deposits

- Data Warehouse and Reporting

- Grants Management

- Project Costing (Coming Soon)
- Purchasing (Coming Soon)

Practitioner Courses:

- Asset Management (Property Control)

- General Ledger (Editing Speedtypes)

- Accounts Receivable and Billing (Cohort 1)

Questions

Contact Us

Training Survey

website: onesource.uga.edu
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OneSource Service Desk: 706-542-0202

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