



ONESolution

SURVEY RESULTS

2019



Q 5

**Is there a specific report
you are dissatisfied with?
If so, how can it be
improved?**



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R E S P O N S E

It is difficult to know which report will give me the information I need. Usually, I use ONESolution in the spring to determine if the scholarship endowments have enough spending allocation to make new awards. I also use it to double check fund agreements to ensure I am adhering to donor wishes in making the awards.

A N S W E R

A [summary of report descriptions](#) is available on the ONESolution website under the Resources tab. We're continuing to evaluate improvement opportunities in the resources provided.

Q 5

Is there a specific report you are dissatisfied with? If so, how can it be improved?



RESPONSE

Pulling reports is still very confusing and I don't know if what I'm pulling is the correct information. If I pull it two different ways or two different reports I seem to have two different balances. So far this system is not user friendly in my opinion.

ANSWER

Please reach out via [ASKIT](#) so we can provide more direct assistance on which reports are pulling different balances.

Is there a specific report you are dissatisfied with? If so, how can it be improved?

RESPONSE

Detailed monthly report. It would be nice if details of the expenses that are processed on the UGA side were listed out individually on the ONESolution reports. Just seeing UGA operating, UGA travel, etc. on the report isn't very helpful.

ANSWER

Detailed UGA Grant transactional activity is not stored in ONESolution. Expense activity is summarized, and transactional details will need to be found in OneSource UGA Financial Management System. The Foundation recommends running the [UGA_GL_LEDGER_DETAIL_UGAF Query](#) in the UGA Financial Management system to view expense detail.

For assistance with OneSource, you can contact onesource@uga.edu.

Is there a specific report you are dissatisfied with? If so, how can it be improved?

RESPONSE

Honestly, I created a lot of the reports over 10 years ago so they need to be revamped and include more information that ties into UGA Financial Management. The class code needs to be added to more reports. I use the scholarship fund balance report because it also gives the spending budget for all endowments but I do have to export into Excel to revise the title.

ANSWER

All Campus reports should include the Class Code, PGM Code, and Dept ID. If you find a report that is missing this information. Please notify us through [ASKIT](#).

RESPONSE

I need an easy to read research expenditures report. I also need a summary report for my unit, that has the budget, what has been spent to date, and what remains, collapsed into meaningful categories and not a jillions different chart strings

ANSWER

The [Current Year Expenditure Report](#) under the General Reports tab should assist with summary expenses for a unit. It will show summary expenses by fund, and remaining cash balance.

Q 5

Is there a specific report you are dissatisfied with? If so, how can it be improved?



RESPONSE

Can't get on my office-campus pc.

ANSWER

Please reach out via [ASKIT](#) to provide more information on this issue.



Q 7

Please provide a specific example of data you find difficult to interpret on a ONESolution Report.

Please provide a specific example of data you find difficult to interpret on a ONESolution Report.

R E S P O N S E S

I have even taken a class and still have trouble understanding them. If I could just see the money I have and can spend and not have to see all the other jargon. The faculty don't understand either I don't think. I had a faculty try to talk to someone and I don't believe anyone ever consulted with him.

The spending allocation and cash balance. What can be spent from non-endowed and endowed accounts

A N S W E R

Here are a few of the reports we would recommend using to see current/remaining cash balances:

- The [Financial Statement](#) shows current cash available to spend (Object Code 11900 Cash (Sub0)).
- The [Current Year Expenditure Report](#) shows current cash available to spend for both endowed and non-endowed accounts.
- The [Current Spending Budget Report](#) shows remaining cash for endowed accounts.

Please provide a specific example of data you find difficult to interpret on a ONESolution Report.

RESPONSE

I am new to the system but, we have trouble sometimes finding the report with the information we are looking for. It may be just getting more familiar with the system will help. Something that would be helpful in doing check requests is to be able to type in the account name (or part of) or number instead of having to scroll through the entire list. Same with the object code, if we could enter the number instead of scrolling to the both of the lists every time.

ANSWER

A [summary of report descriptions](#) is available on the ONESolution website under the Resources tab. We're continuing to evaluate improvement opportunities in the resources provided.

IT is working with Advancement Services to add this enhancement to the [Electronic Request Form](#). The form was designed by a 3rd party vendor that we no longer work with, so we will have to develop these enhancements in-house.

Q 7

Please provide a specific example of data you find difficult to interpret on a ONESolution Report.

RESPONSE

I sometimes find it difficult to locate the correct place of the spending budget or allocation.

ANSWER

The [Current Spending Budget Report](#) shows the spending budget allocation for the current fiscal year. The [Financial Statement](#) or [Current Year Expenditure Report](#) also shows current cash available.

RESPONSES

Any of the pre-fab reports I pull up...for example, why don't they sum up at the end of each column?

The reports I've been told to pull also include salary. I need expense budgets more than salary for what I manage day to day.

ANSWER

Please reach out via [ASKIT](#) to provide more information on what specific report is not summed at the column level.



Q 8

**Would you be interested in new reports being added to ONESolution?
If so, please describe a report you would like to have.**

Would you be interested in new reports being added to ONESolution? If so, please describe a report you would like to have.

RESPONSE

Yes, I would like to see a simpler report similar to the Detailed Status Report. I would say that it would only include items that were expended or income, but not delineated by fund type. It would be nice to have a simple report to print to show items without all of the extra pages.

ANSWER

The [GL Query \(Flutter Report\)](#) is a direct-to-Excel, robust query that shows detailed transactional information. This report works great with using Excel organizational tools to analyze financial data or create a personalized financial report. You can set the parameters to include only revenue or expenses, by using "RV" or "XP" in the Object Type box. You can run for all transactions for a fund, or limit to certain object codes (i.e. credit card fees).

Q 8

Would you be interested in new reports being added to ONESolution? If so, please describe a report you would like to have.

RESPONSE

It's difficult to know what report you need as well as how to ask for what you need. It takes me several tries to be able to provide the info it requires to pull the report.

ANSWER

A [summary of report descriptions](#) are available on the ONESolution website under the Resources tab. We're continuing to evaluate improvement opportunities in the resources provided.



Would you be interested in new reports being added to ONESolution? If so, please describe a report you would like to have.

RESPONSE

Summary reports that show expended dollars - similar to the ones provided during meetings about endowed funds not being expended.

ANSWER

The [Current Year Expenditure Report](#) under the General Reports tab should assist with summary expenses for a fund.

RESPONSES

Maybe a key of what all the terminology means?

The language used to describe the report types is a bit confusing and could be more clear. Also, some of the numbers given in the reports are confusing and I wish you could hover over them for an explanation of what they mean. Example: "Income Balance" -- what does that exactly include?

ANSWER

We're continuing to evaluate improvement opportunities in the resources provided.

Would you be interested in new reports being added to ONESolution? If so, please describe a report you would like to have.

RESPONSE

Integration with PeopleSoft would be the best reporting option. Being able to run a transaction report and have hyperlinks to the document in the system would be very helpful. Moving from paper check request processing to system workflow in general would be very helpful.

ANSWER

IT is working on ways to better integrate ONESolution with PeopleSoft to get users the data more consistently. We currently have an [Electronic Check Request Form](#) that replaces the paper check request process, which we will be re-evaluating for campus roll-out with the new Foundation Account Management Enterprise update.

Would you be interested in new reports being added to ONESolution? If so, please describe a report you would like to have.

R E S P O N S E

Need to be able to create our own report. It would be helpful if we could generate a report which contains only a certain field, such as a list of credit card fees, deposits from all accounts, or all check requests.

A N S W E R

The [GL Query \(Flutter Report\)](#) is a direct-to-Excel, robust query that shows detailed transactional information. This report works great with using Excel organizational tools to analyze financial data which can be filtered. You can run for all transactions for a fund, or limit to certain object codes (i.e. credit card fees).

R E S P O N S E

Not to add a report but to add the new class codes or the companion chartstring to the fund profile report.

A N S W E R

The [Fund Profile Report](#) has been updated to include UGA Chartstring information (Class, Dept ID, PGM Code).

Would you be interested in new reports being added to ONESolution? If so, please describe a report you would like to have.

RESPONSE

A report of the expenses that have posted on the foundation side.

ANSWER

The [GL Query \(Flutter Report\)](#) is a direct-to-Excel, robust query that shows detailed transactional information. This report works great with using Excel organizational tools to analyze financial data.

Another option is the [Current Year Expenditure Report](#), which can be found under the General Reports tab. This report should assist with summary expenses for a fund.

RESPONSE

A summary report with revenues, expenses and a balance in a format that even a faculty member could understand.

ANSWER

The [Monthly Summary Report](#) summarizes the revenue and expense activity for a fund during a given month. This report can be found under General Reports. The [Current Year Expenditure Report](#) shows summarized expense activity, along with available cash, and appreciation/depreciation balances.

Would you be interested in new reports being added to ONESolution? If so, please describe a report you would like to have.

RESPONSE

A report that would show all expenses that have been made against an account. Even the one that have been made through OneSource. To have ONESolution and OneSource some how tied together as far as being able to see exactly (all) moneys that have been used out of the foundation fund (accounts).

ANSWER

The [Current Year Expenditure Report](#) under the General Reports tab should assist with summary expenses for a unit. ONESolution and OneSource are separate systems. There is not a direct feed between the two. The timeliest financial data will be found in OneSource Financial Management.

RESPONSE

Not so much new reports as adding certain columns to pre-existing reports.

ANSWER

Please reach out via [ASKIT](#) to provide more information on what reports you would like to see additional information/columns.

Q 8

Would you be interested in new reports being added to ONESolution? If so, please describe a report you would like to have.



RESPONSE

A report that shows detail expenses; transfer amounts and from what department or unit, and the amount that is available to spend.

ANSWER

The [GL Query \(Flutter Report\)](#) is a direct-to-Excel, robust query that shows detailed transactional information. This report works great with using Excel organizational tools to analyze financial data or create personalized financial reports.

Would you be interested in new reports being added to ONESolution? If so, please describe a report you would like to have.

RESPONSE

I would like a report that details the spending allocation formula in real time, so that it is a little easier to estimate what the next fiscal year allocation could possibly be. Another report that would be useful is to show expenses processed on the UGA side and the Foundation account side for Foundation chart strings so it is easier to have a snapshot of the total expenses for the month or annually based on the fiscal year. On the UGA side expenses for Foundation funds seem to process a lot faster and so it takes awhile longer for those transactions to show up on the ONESolution reports.

ANSWER

The spending calculation formula is available on the spending budget reports when they are released early Spring. The [spending formula](#) can also be found on the UGA Foundation website, under policies.

For quick reference, the formula is $(80\% \times ((1 + \text{CPI}) \times \text{prior year spending amount})) + (20\% \times (4\% \times \text{Current Endowment Market Value Ending 12/31}))$.

Would you be interested in new reports being added to ONESolution? If so, please describe a report you would like to have.

RESPONSE

I would like a report that details the spending allocation formula in real time, so that it is a little easier to estimate what the next fiscal year allocation could possibly be. Another report that would be useful is to show expenses processed on the UGA side and the Foundation account side for foundation chartstrings so it is easier to have a snap shot of the total expenses for the month or annually based on the fiscal year. On the UGA side expenses for foundation funds seem to process a lot faster and so it takes awhile longer for those transactions to show up on the ONESolution reports.

ANSWER CONT'D

Since there is no direct feed between ONESolution and OneSource, the timeliest financial data will be found in OneSource Financial Management. We're continuing to evaluate improvement opportunities.

Q 8

Would you be interested in new reports being added to ONESolution? If so, please describe a report you would like to have.

RESPONSE

I'm mainly checking ONESolution while I'm approving expenditures that route through my office. I need to make sure funds are available for the transaction. I would really like to have one easy to read report that I can quickly run to view single or multiple fund balances. Now if I need to look up multiple funds I have to close and reopen the window.

ANSWER

The [Current Year Expenditure Report](#) can show all funds within a unit/department, and the current cash available for that specific fund.

Would you be interested in new reports being added to ONESolution? If so, please describe a report you would like to have.

RESPONSES

Yes, we'd like to know what expense are being paid off when those journals are done to cover what we've paid in PeopleSoft. I know this is not easy, but we are in a constant state of 'what has hit this account'.

A report detailing the OneSource charges covered by the UGA C&G monthly transfers

Anything that would clarify what dollars were spent on once they move from the UGAF to UGA account. Right now, I just see a lot of transfers in some funds and it doesn't tell me much.

Report which includes both UGAF and UGA expenses

ANSWER

Detailed UGA Grant transactional activity is not stored in ONESolution. Expense activity is summarized, and transactional details will need to be found in OneSource UGA Financial Management System. The Foundation recommends running the [UGA_GL_LEDGER_DETAIL_UGAF Query](#) in the UGA Financial Management system to view expense detail.



Q 1 1

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?

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RESPONSE

I would like to be able to redact information within the pdf attachments in GLUPKY, but that may not be possible. I can always save the document, redact the sensitive information, and then reattach the document. But that is a hassle. Especially since I cannot delete the old documents from GLUPKY myself.

ANSWER

Redaction of a PDF attachment is possible, using Acrobat Pro DC software's Redact tools to remove sensitive information. However, the original PDF must be downloaded from ONESolution to a PC desktop, the sensitive information redacted, and the redacted PDF saved and attached in ONESolution via the GLUPKY document type. For security purposes, the ONESolution software is defined to only allow attachment deletion by a System Administrator.

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?

RESPONSE

Can the search fields be updated to include class code as an option to find our fund?

ANSWER

We're continuing to evaluate improvement opportunities.

RESPONSE

I use the "Monthly Summary Report with Principal Income Totals" report for the most part. The issue I have is trying to read it sometimes. There is no subtotal for total "income" on the report. The deductions are subtotaled but the beginning balance and additions for the total "revenue" or whatever you want to call it is never shown so it is hard to read sometimes.

ANSWER

Please [reach out to the Foundation Expenditure Control team](#) for more detailed information on the funding and expenses for the UGA Grant Activity.

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?

R E S P O N S E

I like the drill-through option and use that to export to excel. But it would be nice if I could somehow drill into all the deductions and get it all at once instead of having to drill each category and combining in excel (Operating, travel, scholarships, transfers, C&G transfers, etc). It becomes tedious especially when I try to balance once a month.

A N S W E R

Drill Down reports rely on 'detailed transactions' which are sorted by Obj Code. Obj Type (XP,RV,etc.) drilling down is currently not available. You could also run the [GL Query \(Flutter Report\)](#) to show detailed expense data in Excel.

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?



RESPONSE

I use one report in ONESolution, the Scholarship Fund Balance Report. I remove the "2" so that I can see all Terry fund balances. The menu that comes up, where I go to remove the 2, is so small I cannot read it. I have to get right up against my computer screen to see it.

ANSWER

We are testing the next version of ONESolution which is HTML based and should resolve this issue. The new Foundation Account Management Enterprise is scheduled to be online early next year.

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?

R E S P O N S E

I would like to understand more how the C&G transfers work now. Sometimes I have a hard time adding up what has been sent over to UGA and what still needs to be sent. I understand it might be hard to show that but then can you share the logic behind it? Is it everything that has cleared by a certain date for the whole month? The searches always default to the last day of last month. Is there a way they can default to today's date? Is that a setting we can change if we have a preference?

A N S W E R

Given all reports are based on real-time data, many reports are designed to be ran at the end of a period for most accurate results.

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?

RESPONSES

These may already exist and I just don't know where to go to access them...however, any quick cheat sheets on how to pull basic reports would be very helpful.

A quick reference guide for reporting. There may be additional reporting that would be helpful, but I may not have access or be unaware of the right report to get access to detailed information quickly.

ANSWER

A summary of report descriptions are available on the [ONESolution website](#) under the Resources tab. We're continuing to evaluate improvement opportunities in the resources provided.

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?

RESPONSE

I really don't understand why taxes should be removed from OneSource payments and not ONESolution even though the money is foundation money one way or the other.

ANSWER

Unlike the University of Georgia, the University of Georgia Foundation is not exempt from sales and use taxes. Any expenditure paid directly to the vendor by the Foundation must include applicable sales taxes. For more information on this subject, please contact the [UGAF Expenditure Control Team](#).

RESPONSE

I always have to have my access re-opened due to time between logins. If that could be fixed that would be great.

ANSWER

DAR policy requires that ONESolution users who have not logged in within 90 days will have their account automatically deactivated. We have implemented a process that will notify users 10 days, 5 days, and 1 day before their account is set inactive. All users have to do is sign on to the system to reset account for 90 days.

Q 1 1

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?



R E S P O N S E

300 miles off campus and can't attend training on campus.

A N S W E R

There are opportunities for virtual training – please reach out to [Client Services via ASKIT](#) for more information. This option is available if the ONESolution client is currently installed on your computer.

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?

R E S P O N S E S

More online user training would be helpful especially for new employees to UGA so they would have a resource to refer back to and honestly UGA has now set the bar high with their training library.

Training! Live training so we can know how to find and pull the reports we need.

A N S W E R

A [summary of report descriptions](#) are available on the ONESolution website under the Resources tab. We're continuing to evaluate improvement opportunities in the resources provided.

The Foundation recently organized a drop-in workshop for campus users to ask questions and bring real work examples. Please keep an eye out for email communication with details regarding future workshops. There are also monthly training classes provided at the Foundation. You can [register for these courses](#) on the ONESolution website.

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?

R E S P O N S E

On the status reports for UGA expenses it would be nice if you could drill down on the dollar amount for the month to see what makes that dollar amount, it's very hard when you have a lot of expenses in a month to figure out what makes up the amount on the status report.

A N S W E R

Detailed UGA Grant transactional activity is not stored in ONESolution. Expense activity is summarized, and transactional details will need to be found in OneSource UGA Financial Management System. The Foundation recommends running the [UGA_GL_LEDGER_DETAIL_UGAF Query](#) in the UGA Financial Management system to view expense detail.

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?



R E S P O N S E

My biggest struggle with ONESolution is using it on a Mac. Because going through the virtual desktop to access it is so cumbersome, I only go into ONESolution when I absolutely have to. I understand that the Mac users are probably a minority though.

A N S W E R

We are currently testing the next version of ONESolution which is HTML based and will run from a Safari browser on a MAC. The new Foundation Account Management Enterprise is scheduled to be online early next year.

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?

RESPONSE

There are hundreds of reports, but most people can't find what they need because of the naming conventions. A search function or a sortable list would be very helpful.

ANSWER

There is a search box in the upper right hand corner of ONESolution. If there are multiples of the same report, the campus version will end with a "CP" – If you do not have access to a report and search for it, you will only see 'searching...' displayed in the search box with no report name. This is based on the client's security profile and their current authorization.

RESPONSE

I would like more reporting options. Whether pre-loaded views or something similar to the data warehouse for OneSource that I can create my own report.

ANSWER

The [GL Query \(Flutter Report\)](#) is a direct-to-Excel, robust query that shows detailed transactional information. This report works great with using Excel organizational tools to analyze financial data. You can run for all transactions for a fund, or limit to certain criteria.

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?

R E S P O N S E

If ONESolution includes the Electronic Check Request webform, please, please, please update it so that the following things can happen: 1. ALL text saves when you save the request for submission at a later time. 2. You are not limited with the amount of text you can add to the form 3. You are not limited to the number of line items you can add. 4. You can see the entire form at one time - right now you have to tab over to see the amount and then can't see the rest of the form. 5. Have links on the webform to travel distribution forms, entertainment forms and any other form we may be required to turn in with a request.

A N S W E R

We are working with Advancement Services to add this enhancement to the Electronic Request Form. The form was designed by a 3rd party vendor we no longer work with so we will have to develop these enhancements in house. We are currently testing the next version of ONESolution which is HTML based. The new web form is much more robust and should resolve most, if not all of these issues. The new Foundation Account Management Enterprise is scheduled to be online early next year.

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?

R E S P O N S E

Using PeopleSoft now for some Foundation transactions, I think it would be good to have another training workshop to just go over a few things. We still have people trying to set up budget, move funds, etc. I think with the changes, a refresher would be nice. Also a basic workshop on how to read the ONESolution reports would be good. Many do not understand endowed accounts, do not understand spending balances, assets, etc. Having a course to walk through reports for people would be very beneficial.

A N S W E R

The Foundation recently organized a drop-in workshop for campus users to ask questions and bring real work examples. Please keep an eye out for email communication with details regarding future workshops. There are also monthly training classes provided at the Foundation. You can [register for these courses](#) on the ONESolution website.

Would you like to provide any additional feedback and/or suggestions for improvements to ONESolution?



R E S P O N S E

I like ONESolution the way that it is.
Please don't change it!

R E S P O N S E

Thank you for adding the GL Query
report

R E S P O N S E

Overall I'm pleased. I'm not a power
user but am able to retrieve most of
what I need via the system. When I
need support, I reach out and
receive what I need from Foundation
staff.