ConnectCarolina Accomplishments
Fiscal Year 2015

Finance

- Updated the printable requisition reports for ePro.
- Added the payment date to an AP report.
- Created an unpaid vouchers query for GA.
- Synced BI Publisher Report update with the Departmental Deposits process.
- Ran a process to ensure that all departmental approvers have at least basic access to ConnectCarolina.
- Created Income Statement and Balance Sheet reports by MOU.
- Updated the default payment method on transfers.
- Created a query that showed the mapping of FRS object codes to GL accounts for UNC-Chapel Hill, the foundations, and UNC-GA.
- Allowed Financial Gateway wire file to dispatch successfully.
- Updated distribution flags so that direct journal payments generated and posted to the GL.
- Automated the removal of encumbrances from Commitment Control.
- Changed the Remit-To Address field on the campus voucher to allow staff to choose an address.
- Created two new queries and updated one query for reconciling GradStar with Finance.
- Created five queries for GradStar, similar to reports that were in place for Starlight.
- Created an inventory account string to allow proper accounting for Facilities.
- Updated the Amount field in the Setoff Debt Collection Account (SODCA) file so that it could be accepted by the State.
- Corrected an error related to chartfield processing in Web Travel.
- Updated Web Travel values to be consistent with values in the legacy system.
- Removed the requirement for ACH on Travel documents.
- Created a new Diner's Club report to support payment of the Diner's Club airfare bill.
- In the Vendors option, updated the 1099 requirement for some employees.
- Added options related to searching by ledger group criteria for campus journals.
- Decommissioned the ViewStar Fax Server.
- For all open projects, created budget attributes for the OSR and OSR Parent budget ledgers.
- Converted fixed price contracts to cost reimbursement.
- Fixed an issue related to pay cycles for wire transfers.
- Changed the naming convention for ACH files in Cybermation, the system that manages automatic processing.
- Created a new query for the Vendor Coordinator to help with identifying vendors with missing tax ID numbers (TINs).
- Changed the query used to validate the banking information entered on wire transfers.
- Added two approval routings, one for the source type of "Retro" and one for "Treasury."
- Fixed an issue that prevented users from retrieving and viewing attachments if no comment was entered when the document was attached to the transaction.
- Created a query to list vendors who were missing 1099 information.
- Resolved an issue related to historical OSR Billing transactions being set to inactive.
- Made changes to the NCAS program.
- Changed Campus Vouchers to not submit automatically.
- Migrated changes to existing grants query.
- Changed options for how the NCAS report ran.
- Modified custom views for security.
- Added department 201400 for the Chancellor's office.
- Mapped all assets to plant funds in asset management.
- Allowed receiving by PO only if no requisition existed for the PO.
- Updated the Voucher approvals process to prevent departments from approving a voucher multiple times.

Finance (continued)

- Updated the SPOTS delivery routes file for Fisher Scientific.
- Fixed a conversion error related to incorrect commitment accounting flags.
- Fixed an issue related to changed locations in the SPOTS system.
- Added a temporary approval stop that held travel vouchers until existing vouchers were processed.
- Fixed an error related to reconciling deposits.
- For purchase requisitions, removed an approval stop related to capital assets to match a new business process.
- Converted Grants open items into ConnectCarolina from FRS.
- Changed the approval process for vouchers and requisitions to include the business unit.
- Removed duplicated FedEx charges from September 2014.
- Removed extra spaces from the addresses submitted from the SPOTS system on 10/8/2014.
- Fixed an issue related to moving to a four-digit year for OSR.
- Fixed formatting issues on Bank of America Positive Pay file.
- Fixed an issue related to splitting charges on journal entries.
- Change the purchase requisition function to require budget to be valid before the requisition could be submitted.
- Fixed an issue related to PIDs for UNC students not being accepted in Web Travel.
- Automatically created ship-to addresses for rooms that were inactive.
- Installed GSHIP premium interface.
- Updated the permissions list for inquiries.
- Reset a flag for vouchers to allow them to be updated, posted, and selected for payment.
- Fixed a conversion issue related to contracts being incorrectly set to "no bill" for month-end billing.
- Removed incorrect bank statements loaded for SunTrust.
- Updated the Miscellaneous Budget Status on vouchers rolled forward to next month.

- Fixed a conversion issue related to attachments for vendors, vouchers, and independent contractors.
- Fixed an error related to printing OSR invoices.
- Fixed an error related to F&A default chartfields for Department and Program being set incorrectly on UNCCH F&A grant journals.
- Fixed an issue related to duplicate document sequence numbers when deleting GL journals.
- Updated security for Web Travel users.
- Updated the CBM system.
- Made a change related to how chartfields are processed by University Accounting Services during month-end.
- Fixed an issue in CBM to allow allocation files to be deleted if they cannot be imported due to errors.
- Updated location ID on contract header for sponsors.
- Fixed project costing tables to sync project start dates.
- Added project IDs that begin with 3s to the range of projects used to create a speedchart userd in procurement and payables.
- Created a process that ensured all campus locations imported from the SPOTS system have unique IDs.
- Updated the NCAS reports to allow UNC-GA to sum its own cash accounts, separate from UNC-Chapel Hill.
- Resolved an issue related to billing that caused problems downstream for GL and AR.
- Resolved an issue related to determining the correct bank account for Accounts Receivable business units CHSTU, CHOSP, and GAMSC.
- Resolved an issue that prevented three staff members from getting access to Web Travel.
- Resolved an error related to PIDs that prevented the ACH load from running.
- Changed the Central Office approval stop to route journals to UNC-GA if needed.
- Updated GradStar to include academic careers: MED, DENT, PHCY, and LAW.

Finance (continued)

- Loaded open items from October and November 2014.
- Created a solution for storing deleted Commitment Control data.
- Turned on an ACH email notification for all vendors (including employees) who have email information in the legacy FRS system and who have an ACH payment method set up in ConnectCarolina.
- Added two additional GL accounts with associated bank accounts.
- Reclassified employees who were not marked as vendors during the conversion at go-live.
- Deleted all vendors who were incorrectly marked as 1099-applicable.
- Moved outstanding FRS check data into ConnectCarolina.
- Added functionality to validate and update accounting dates for deposits.
- Added two vendor IDs for the Lincoln Financial Group to facilitate benefit plan reconciliation.
- Updated POs to liquidate pre-encumbrances so they weren't budget checked twice.
- Added primary billing contact information to the top of invoices.
- Fixed an issue in AP related to deductions with tax class T.
- Updated the vendor request option to verify that new vendors do not already exist before processing the request to add a vendor.
- Corrected how dollar signs display in budget journal approvals.
- Removed Carolina Inn vouchers that were duplicated in January 2015 processing.
- Updated the system to move batches of wire transfers from In Progress status to Awaiting Dispatch status.
- Added an Open Item key field to campus journals.
- Resolved issues with adding and viewing attachments in ImageNow.
- Extended the project end date on 631 projects.
- Added the approval status to an AP query that shows unposted vouchers.
- Created an Asset Management Vehicles Inventory.

- Created Asset Management Fully Depreciated Assets.
- Updated the View Invoice Image link.
- Deleted campus vouchers that had been denied at least 90 days ago.
- Created journals for UNC-Chapel Hill's 13th Month Process.
- Masked social security numbers for independent contractors in ConnectCarolina.
- Allowed travel agents to reject airfare documents.
- Streamlined month-end and cashier processing for departmental deposits.
- Created a budget checking service for web applications.
- Updated the view for F&A Formula Allocation,
- Made updates to NCAS for early close.
- Added flexibility to the Cashier Approver step.
- Revised the AP query for viewing foreign vendors.
- Created a process for canceling requisitions that meet predetermined rules.
- Restricted access to Web Travel.
- Fixed an issue related to email approvals in Campus Vendor.
- Fixed the URL in the email generated when a vendor request is denied.
- Created two reports for UNC-GA showing vendors and voucher payments.
- Added queries needed for fiscal year end.
- Fixed the option in the Surplus Property Management System for choosing building names.
- Improved performance for deleting vouchers.
- Adjusted how AR works for grants.
- Created two reports for UNC-GA showing vendors and voucher payments.
- Added queries needed for fiscal year end.
- Improved performance for deleting vouchers.
- Blocked use of the Vendor Invoice Submission Process (VISP) application until fiscal year end was completed.
- Updated Web Travel reporting and the Pcard administrative functions.
- Fixed an issue related to not being able to display more than 99 ImageNow attachments.

Finance (continued)

- Provided an option to set the maximum amount allowed per requisition for ePro Vendor Catalog vendors.
- Added the user ID of the person who worked with NCOSA journals to audit reports.
- Redesigned the OSR invoice for non-letter of credit awards.
- Converted cost reimbursement projects to fixed price.
- Modified the file name and format of travel vouchers.
- Rounded budget transfers for State funds to the nearest dollar.
- Improved the policy for deleting travel documents.
- Fixed the Data Warehouse data structure to show Parent budgets.
- Corrected Carolina Inn vouchers that were duplicated in January.

HR/Payroll

- Allowed originators to view the actions they created, regardless of department security.
- Made a set of enhancements to the ePAR forms.
- Populated email addresses for NC Custom Suspense program.
- Updated how the ePAR forms work with ImageNow.
- Made changes to a query used with Learning Management.
- Updated legacy retro data so that it could be added to ORBIT outbound files.
- Added four daily audit reports.
- Changed the ePAR search to allow users to see everything in their security structure.
- Updated Group Control post action as part of the open item conversion.
- Added an affiliate type for travel agents.
- Made changes to the interface for UNC parking.
- Synced pay earnings table in the production environment.
- Added a new location code for a department in the School of Medicine.

- Split records on Direct Data Access affiliates and position.
- Updated the accounting date for September payroll transactions Added four job codes for campus.
- Made changes to how HR/Payroll data was processed on the Finance side, fixed chartfield errors, and reset budget-checking status flags.
- Added a new action and action reason to Direct Data Access mapping table.
- Made changes to the ORBIT outbound interface file.
- Added a Librarian job code.
- Added a function to stop employer payroll deductions for retirement accounts when an employee's deduction limit is reached.
- Updated the expected end date beginning with 11/1/2014.
- Implemented process changes for FICA exempt employees.
- Loaded imputed income for faculty physicians.
- Populated benefit plan information for B10 off-cycle checks.
- Added reporting queries.
- Resolved issues related to rounding and other issues for the ORBIT extract file.
- Made a Short Work Break action available in the ePAR forms.
- Created a document ID query.
- Made configuration changes to avoid hardcoding by JobCode values in the GA DataMart.
- Applied tax update 14-F.
- Extended the expected end date by one day due to system requirements.
- Updated payroll calendars.
- Modified the function for printing paychecks to ensure dollar amount and text matched on the paycheck.
- Created retro distribution triggers for funding changes.
- Updated the expected end date for EPA employees to 12/31/14 to allow staff to update records.
- Corrected the pages for working with positions to show the date of the last update and the user ID of the person who made the update.

ConnectCarolina Accomplishments Fiscal Year 2015

HR/Payroll (continued)

- Expanded the Affiliate Request to allow UNC-GA users to see their departments.
- Updated the process for printing W-2s to allow payroll to print active and inactive employees separately.
- Brought the converted data retro distribution into ConnectCarolina.
- Created a custom page for managing funding allocations.
- Loaded retro ARP deductions into ORBIT.
- Applied tax update 15-A.
- Updated tenure status for phased retirement.
- Fixed and reprinted Box12C on W-2s.
- Added new degrees to profile management.
- Updated database by running tenure calculations.
- Cancelled budget checking on ePAR forms.
- Added Faculty/Physicians 403b outbound file for TIAA-CREF and Fidelity.
- Eliminated a customization related the Commitment Accounting lockout.
- Changed the effective date for combo codes to match that on the corresponding chartfield strings.
- Added NC_EMPLOYEE_INFO component to MouseOver Popup setup.
- Added the expected job end date to the page that shows UNC employee information.
- Added a pay group for Summer School Faculty.
- Provided short term solution to calculate salary projections.
- Configured and set up the TRICARE supplement plan.
- Added two new affiliate types.
- Provided salary and fringe projections.
- Added five queries.
- Implemented interface for Med School earnings.
- Enabled phased retirement program indicator for faculty.
- Created interface for Aon Hewitt Census file.
- Updated the position budgets view for the GA Data Mart.
- Made changes for the ACA.
- Changed how HR action reasons work.
- Implemented changes for retro benefits.
- Extended emeritus faculty end date.

- Enabled mass update for EPA grad students.
- Tested printing historical W-2s.
- Created a HR Job Summary report.
- Created custom pre-distribution report.
- Added interface for Aon Hewitt Inbound Election file.
- Added an enrollment link for Aon Hewitt Benefits in Self Service.
- Applied Tax Update 15B.
- Add a notification for summer school pay days.
- Made changes to the payroll paysheet validation reports.
- Added audit tables for compensation and job records.
- Created a Payroll query.
- Cleaned up phone number data.
- Added thirteen queries related to Faculty Physicians.
- Fixed the indicator that specifies primary job on the Hire ePAR form.
- Made citizenship a required field on the Hire form.
- Added a new message on the Hire ePAR form for department transfers.

Student Administration

- Retrofitted, tested and deployed multiple bundles of PeopleSoft's application patches.
- Fixed an issue related to payment handling codes on student refunds.
- Added four queries for the Graduate School using the 3C engine.
- Made changes to restricted access for Advisor Center, Student Center and Term History for specific staff.
- Made changes to restricted access for Grad tracking, internal transcript, Student Grades and Enrollment request search for all users.
- Restricted access to student information in queries.
- Made changes to UNC Privacy default settings.
- Designed a page to allow support personnel to determine when changes were sent to Identity Management, HR/Payroll and Finance.

ConnectCarolina Accomplishments Fiscal Year 2015

Student Administration (continued)

- Exported student pictures to the Campus Housing landing zone for students' identification.
- Set up the FERPA checker to run nightly.
- Made changes to multiple online admissions applications for the Friday Center, Undergraduate Nursing, Dental Assistant, Summer School, Physical Therapy and Radiologic Science, Part Time Course Studies, Pharmacy Supplemental, Certificate programs.
- Updated Undergraduate Admissions application evaluation review process, made updates to the Common App, summary reports.
- Migrated GradStar projects into production environment after Finance/HR PeopleSoft implementation.
- Applied NSC Report critical patch.
- Applied modification for calculating academic standing.
- Loaded ATP file from CollegeBoard.
- Updated the FA Export Process to allow GradStar awards to be imported.
- Fixed GradStar chartfield account error.
- Moved GradStar extract process into production environment.
- Removed the OBIEE reporting tool from the portal.
- Implemented the GradStar VISA requirement change.
- Customized the Satisfactory Academic Progress page for Financial Aid.
- Implemented fixes to GradStar Remission, Instate and Daily Update.
- Added language related to consent for dropping courses, as requested.
- Modified TouchNet to allow Visa payments to the Cashier's office.
- Removed the option of "intersex" from gender options in Guest ID Account Registration.
- Cleaned out billing so that student billing could be rerun.
- Corrected an error related to the midyear grades checklist.

- Implemented an ISSS solution for International applications.
- Implemented a custom interface for work study.
- Modified the process for loading student photos for campus health.
- Changed the vendor used for ordering and delivering official Transcripts.
- Re-evaluated the transfer credit e-form.
- Loaded middle name to the custom professional school application.
- Fixed the process that assigns advisors.
- Changed the process for identifying Alumni correctly in the system.
- Implemented a mobile solution for students via the student created app CarolinaGO.
- Corrected an issue related to how checklists display to applicants and students.
- Implemented the mapping of the undergraduate file parser in production.
- Completed student withdrawals – phase 2.
- Implemented FA SAP custom page adjustments.
- Enabled selection criteria for the Student Mass Mail system.

University Services

- Made changes to Virtual EMS website configuration for Friday Center.
- Modified CBM to incorporate changes to the accounts payable process.
- Modified the approvals workflow for OSR.
- Modified the Bill Presentation system.
- Added new report in the CCRpt system to list contacts not in LDAP.
- Applied vendor updates for EMS software.
- Implemented a proof approval system for use by Xerox printing.
- Expanded PrintStop notification emails to include department name.
- Automated system announcements for Friday Center applications.
- Added Time-of-Day for Student Store announcement controls.
- Change Xerox Printing page footers to reflect staffing changes.

ConnectCarolina Accomplishments Fiscal Year 2015

University Services

- Added functionality to flag departments that are no longer active so the Student Stores Vendor application can make the department number inactive.
- Created a new report for FedEx eCommerce.
- Refined direct pay invoices in CCInvoice system.
- Added new EMBA enrollment deposit upay site.
- Added phone number to the PID create process for Friday Center Continued Education Unit.
- Made changes to Friday Center Credit programs regarding text changes and wait-list.
- Enhanced the Hospital update and reporting.
- Moved toll usage reporting off the legacy mainframe computer to a Web-based application.
- Upgraded the AiM system.
- Processed BellSouth file for Telecom.
- Implemented Search/Match 61 & 62 in PIDCreate system and the hospital update system.
- Refined the CCInvoice system content and format.
- Updated the Environmental, Health & Safety Select Agent system.
- Added military indicators to the Web-based course registration system for the Friday Center course.
- Added a new interface for Friday Center web registration on the UNC-CORE site.
- Updated EHS Hazardous Waste Pickup.
- Modification to UNC TV Thank you letters.
- Made Student Stores PreOrder pages look like Textbook Orders.
- Updated the HASMIS system.
- Modified Lab Safety plan, schedule G.
- Enhanced Print Shop Order process.
- Refined the CCInvoice system's medical school and dental school portals.
- Updated Friday Center credit programs message texting and navigation.
- Updated the Environmental, Health & Safety compliance portal.
- Updated the ITS Self Study application.
- Updated the Environmental Health & Safety LabRadWorker system.
- Rebranded Carolina Copy and Carolina Managed Print Services.
- Updated the CBM system.
- Updated Chartfield Checker, the Web-based tool that checks chartfield strings for errors and budget checks them.
- Implemented SAI Application Phase 1.
- Changed the UNCStoreFront Textbook Search/Order page.
- Enhanced the option for selecting departments selection for roster submit for Friday Center CEU.
- Enhanced web registration for participant information for Friday Center Professional Development.
- Enhanced textbook pre-order entry interaction.
- Added Machine Contact PID problem list to the CCRpt system.
- Enhanced CBM system for modifying charges.
- Updated ECH lab safety plan.
- Fixed the option in the Surplus Property Management System for choosing building names.

Reporting

- Supplied new index for reporting team.
- Added new Asset Management reports.
- Updated timing of fact table job in workflow.
- Provided Over the Limit and Report Due OSR Reports.
- Added Trial Balance and Fund Balance nVision reports for UNC-Chapel Hill, Foundations and UNC-GA.
- Created new queries for the Budget Office.
- Added SEFA year end report for OSR.
- Created nVision report for accounts receivable deposit reconciliation.
- Provided an Unpaid Vouchers List report that excludes prepaids.

ConnectCarolina Accomplishments Fiscal Year 2015

Cross-Functional

- Fixed a query with an embedded links issue.
- Fixed a data conversion issue related to suspense.
- Completed TIM mapping to new combo codes.
- Made changes to the pay stub so that it's easier for employees to understand.
- Made configuration changes to Grey Heller firewall due to vulnerability findings.
- Updated the Web-based service that verifies that chartfield strings are valid.
- Added locations and routes that were missing from the SPOTS location file.
- Updated the TIM system.
- Updated the Commitment Control ledger view.
- Ran Commitment Accounting ARP funding reports for EPA employees.
- Extended the project end date on multi-year projects to allow campus to charge Annual Raise Process (ARP) lump sums.
- Created report to show PID counts.
- Created a query to identify employees whose funding sources have low budgets so funding can be corrected before going into suspense.
- Removed access for ConnectCarolina administrative users who did not accept Terms of Use.
- Reassigned services to new subscribers.
- Revoked script access to close a series of security exposures.
- Modified Campus Solutions to Finance web service to include business email addresses.
- Excluded taxable benefit extraction to Accounts Payable.
- Added ITS-Security lock message on portal.
- Provided functionality to deprovision administrative access from ConnectCarolina for terminations.
- Extended multi-year grants and converted department budget table to percentage.
- Added a Retro Salary link in the ConnectCarolina portal.
- Changed wording in the Terms of Use Certification.

Acronym Key

This...	Means ...
ACA	Affordable Care Act
AP	Accounts Payable
AR	Accounts Receivable
ARP	Annual Raise Process
CABS	Central Airfare Billing System
CAFR	Comprehensive Annual Financial Report
CBM	Customer Billing Management
ePAR	Electronic Personnel Action Request
GA	UNC General Administration
GL	General Ledger
GSHIP	Graduate Student Health Insurance Program
MOU	Major Organizational Unit
NCAS	North Carolina Accounting System
NCOSA	North Carolina Office of the State Auditor
PAAT	Payroll Accounting Adjustment Tool
PO	Purchase Order
SPOTS	Space Planning & Occupancy Tracking System.
TIM	Time Information Management
UAS	Unit Accounting System