

Gradstar Webinar

August 5, 2015



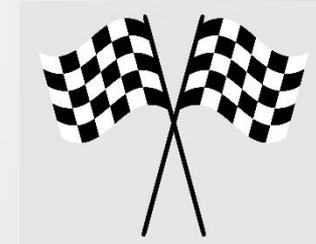
Today's webinar

- Duration is approximately 30 minutes
- Use the chat window to type your questions
 - We will answer questions at the end
- The webinar recording will be posted on the Reporting tab on ccinfo.unc.edu

Webinar Purpose

The purpose of today's webinar is to:

- Gear up for our heavy season of Gradstar entry



- Talk about some new checks in Gradstar you need to know about



Webinar Topics

- There are new system checks for Gradstar entries. Why?
- How might the new checks impact award recipients?
- The new checks:
 - Edit errors
 - Budget errors
- How you can prevent errors

New Checks in Gradstar

Why were new checks added to Gradstar?

- Since go-live, many entries made into Gradstar have had errors
 - No budget set up
 - Not enough budget
 - Amount field with a negative or \$0 amount
- These errors have kept entries from being posted, causing fairly significant problems in the accounting for awards
- The new checks were put in place to prevent these errors going forward

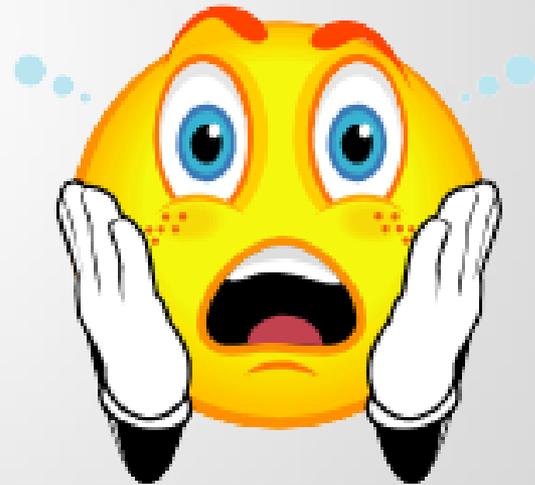
Instate (INS) and Tuition (TUI) Pers

Award	Item Type	Oth Acct Info	Data	Audit Info						
*Award Type	Funding Dept	Fund	nt	Source	Project ID	Program	Amount	Sta		
1	Inst Tuition	480001	25210	48000	5032324		2173.250	Act		

ERROR

Impact to award recipients

If your Gradstar entries have errors, the new checks will prevent your award recipients from receiving their awards



What are the new checks?

1. Edit Errors

- If your entry has an edit error, when you click **Save**, an error message immediately appears on the screen.
- You'll need to resolve the edit error and re-submit your entry.
- The system won't save entries with edit errors.
- Edit errors include:
 - Ensuring the chartfields you entered exist in the system
 - Ensuring the chartfields you entered are an allowable combination
 - Ensuring the number in the **Amount** field is a positive number. The system doesn't allow \$0 or negative amounts.

What are the new checks?

2. Budget Errors

- A new budget checking tool has been added that checks your Gradstar entries for valid budget.
- The tool completes the budget check within a day of you submitting the entry.
- If your entry has a budget error, you will receive an email notification the next day.
- You'll need to resolve the budget error and re-submit your entry.
- The system won't process entries with budget errors.

How can you prevent errors?

1. Double-check with your Finance team to make sure you're using correct chartfield strings and that budget has been set up for them.
2. Use the new **Chartfield Checker** tool to check your chartfield strings for budget errors before you enter them into Gradstar.
3. Double check your work.
 - Did you put a positive number in the Amount field?
 - Did you enter the chartfields and amounts you meant to enter?

What if you get a budget error?

- You may need to contact your Finance team for help in resolving the budget error.
- They may need to work with OSR or the Budget Office, or give you a different chartfield string.

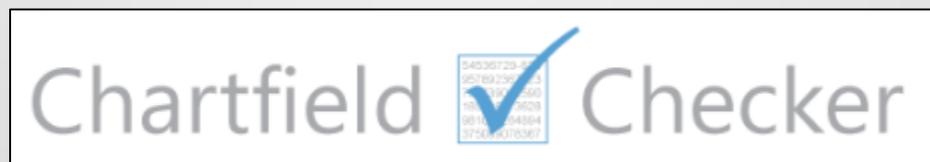


Chartfield Checker

Chartfield Checker

- Chartfield Checker allows you to see if a chartfield string has edit or budget errors
- You enter chartfield strings one at a time
- The system displays the results immediately
- There is a Chartfield Checker Quick Reference Card at:

<http://ccinfo.unc.edu/finance/chartfield-checker/>



Using the Chartfield Checker

1. Go to <http://ccinfo.unc.edu/finance/chartfield-checker/>.
2. For each chartfield string you need to check, enter the complete string and the amount.
3. Click **Submit**.

The screenshot shows a web form for checking chartfields. The form contains the following fields and values:

Business Unit*	uncch
Fund Code*	25210
Source*	49000
Account*	569180
Department*	318300
PC Bus. Unit	chosr
Project	5035902
Activity	1
Program	
Cost Code 1	
Cost Code 2	
Cost Code 3	
Budget Date	2015-07-23
Amount*	1000

At the bottom of the form are two buttons: **Submit** and **Clear Form**.

Annotations in the image include:

- An orange box around the PC Bus. Unit, Project, and Activity fields, with an arrow pointing to a callout box.
- An orange box around the Budget Date field, with an arrow pointing to a callout box.
- An orange box around the Amount field, with an arrow pointing to a callout box.
- An orange box around the Submit button.

For OSR projects, be sure to enter the PC Bus Unit, Project, and Activity.

You can enter a future date to see if a project will be passed the project end date.

Be sure to enter a positive amount.

Using the Chartfield Checker

- If your chartfield string is “okay”, the system displays a message in black text:
 - **“Chartfield String and Amount are valid”**
- That string is okay to enter into Gradstar.

CHARTFIELD STRING VALIDATION AND BUDGET CHECK	
Chartfield String and Amount are valid	
Business Unit*	uncch
Fund Code*	25210
Source*	49000
Account*	569180
Department*	318300
PC Bus. Unit	chosr
Project	5035002

Using the Chartfield Checker

- If your chartfield string has an error, the system displays the error in red text, such as:
 - **Budget Date out of Bounds**
- This string won't be successful in GradStar, so be sure not to use it until you can get the error resolved with your Finance team.

CHARTFIELD STRING VALIDATION AND BUDGET CHECK	
Budget Date out of Bounds	
Business Unit*	uncch
Fund Code*	25210
Source*	49000
Account*	568810
Department*	422001
PC Bus. Unit	chosr
Project	5051678
Activity	1

Error Messages

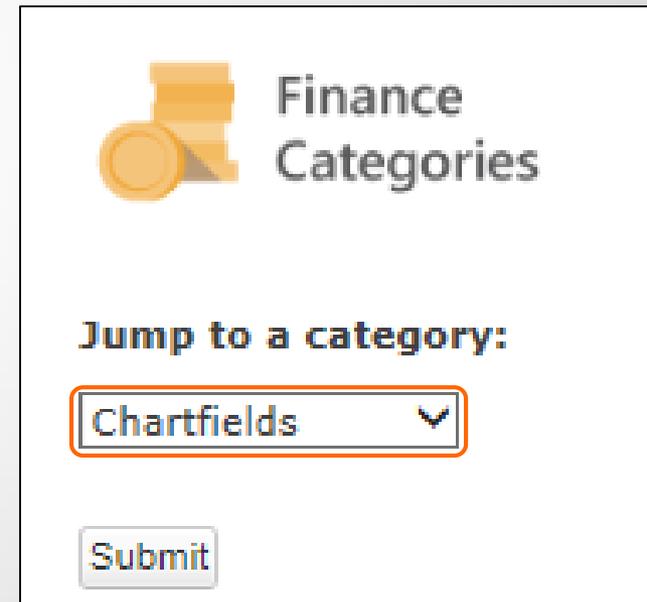
- The possible error messages you will see are:
 - No budget exists
 - Budget date out of bounds
 - Exceeds budget tolerance
 - Invalid Combination
 - Invalid value

Summary

- New checks have been put into Gradstar
 - An immediate error message for edit errors
 - An email notification on budget errors
- Entries with errors can't be processed
- You can use Chartfield Checker to see if your chartfield string will pass
- You may need to have your Finance Team work with OSR to set up a budget, or give you a different chartfield string

Reference information

- Training tab of ccinfo has the Chartfield Checker
 - <http://ccinfo.unc.edu/training/resource-documents/#chartfields>
 - Recording of the webinar
 - Webinar PowerPoint



The screenshot shows a web interface for "Finance Categories". It features a stack of gold coins icon to the left of the text "Finance Categories". Below this, the text "Jump to a category:" is followed by a dropdown menu with "Chartfields" selected and a downward arrow. At the bottom of the interface is a "Submit" button.

Q&A

Thank You