ConnectCarolina/InfoPorte Newsletter | April 13, 2018

Better Reporting: A Single Source of Finance Actuals

Have you ever seen a different number on an invoice to a sponsor than you see in the OSR Ledger Rollup? Have you been unable to find charges on reports that you expected to see? By summer, numbers will match and charges will appear when you expect them to.

You may have heard that our financial reports pull numbers from two main sources: the General Ledger (GL) Actuals ledger and the Commitment Control (or "KK") ledgers. The GL Actuals Ledger tracks the amounts we have actually spent and received. The KK ledgers track our budget balances and the commitments we've made against our budgets. They also contain details about the purchase requests, vouchers, and other transactions that have been processed, so that's why they're a useful place to get reporting information.

Soon: All Actuals Will Come From the GL

Pulling financial information from the KK ledgers in addition to the GL Actuals ledger has caused confusion and added complexity to our reporting. The good news is that a project is underway that, once complete, will ensure that all reports take their "actuals" (that is, what is recorded in the book of record) from the General Ledger. Only budget-related data, such as budgeted amounts, pre-encumbrances, and encumbrances will come from the KK ledgers. This means we'll have a single source for our financial information: the GL Actuals ledger.

It's not a glamorous project. In fact, once the changes are in place, you may not even notice a difference unless you compare numbers with data saved prior to the change. But it's important in that no matter which report you look at, no matter where we are in the month, the numbers will match. Look for more information on this project in upcoming issues of the ConnectCarolina newsletter.

Want To Know More?

In the meantime, if you want to understand more about the differences between the Commitment Control ledgers and the General Ledger, these two documents may be helpful:

• *Why KK Ledgers and the GL Actuals Ledger May Not Equal*

A New ConnectCarolina Home Page for Faculty
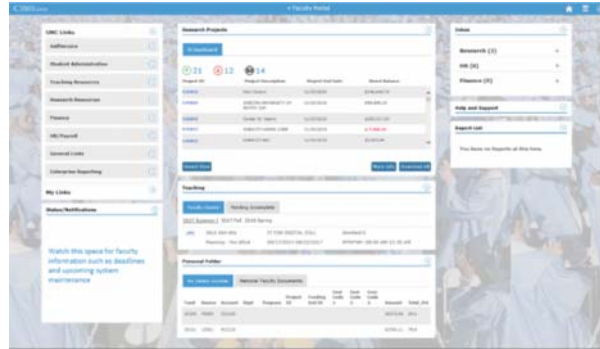
The **Faculty Portal**, a new ConnectCarolina home page for faculty members, is currently being rolled out, school by school. The Faculty Portal combines the teaching and research information faculty members use most onto the first page they see when they log in. From one page, faculty members can:

• access their teaching schedules (which means fewer clicks to print class rosters, email students, create academic progress reports, and enter grades)
• see the students who have incompletes in their classes
• see financial information about their contracts and grants (on the new "PI Dashboard")
• see approval notifications from research applications such as RAMSeS and ecrt
• find charging instructions for their salary (that is, funding sources for their salary)
• access the most commonly-used links for teaching and research as well as as place faculty can add their own links to make the Faculty Portal even more useful.

Do You Work With Faculty?

Do you work with faculty? If so, you may be asked how the Faculty Portal works, and we want to make sure you have resources to answer that question. A **quick-start guide,** available on CCinfo.unc.edu, details **how** to use the Faculty Portal. A **Faculty page** on CCinfo.unc.edu contains links to other documents faculty may find useful.

One thing to be aware of is that some faculty members can't receive the Faculty Portal. That's because they use options that can only be accessed by going through the Main Menu (which the Portal doesn't have) or because they need to use accessibility resources. Since the Faculty Portal makes ConnectCarolina easier to use, we are working towards the goal of all faculty members being able to use the Faculty Portal.

Want to Know More About How Salary Projections Are Calculated?

Over the last year, the ConnectCarolina team has made a few changes to the way salary projections are calculated in ConnectCarolina. The result is that projections are more accurate and you can rely on the amounts being correct regardless of the

funding source or what employee group you're looking at.

The **Understanding Salary Projections** document explains how projections are calculated, but maybe you still have questions?

Join us for a live webinar on **Wednesday, April 11 at 10:00am,** where we'll take a deep dive into how salary projections are calculated. Be sure to mark your calendar and bring your questions. You can join the webinar on Thursday, April 12 by clicking the link: **https://www.anymeeting.com/135-982-522** or from the link on the home page of CCinfo.unc.edu.

A Pilot Group Tests New Performance Management Tools in ConnectCarolina

Currently, managers complete performance plans and evaluations outside of ConnectCarolina, then enter overall performance and competency ratings in the system. Starting in April, a pilot group made up of the Office of Human Resources (OHR) and select departments across campus will use ConnectCarolina for the full process for SHRA employees.

Managers and employees in the pilot group will follow the traditional assessment process but will complete the forms in ConnectCarolina instead of using paper forms. These forms include performance plans, off-cycle reviews, an employee self-assessment, and evaluations.

Staff participating in the pilot are testing the appraisal process from end-to-end with the goal of the rest of campus using it next year. Representatives from the Employee and Management Relations division of OHR are demonstrating the new process to the pilot groups throughout March.

By the Numbers

Total number of transactions entered by the "Top 10" users in a 12 month period for:

ePARs by HR Reps: **10,984**

Campus Journals: **9,480**

ePro Vendor Catalog: **6,205**

The "Mosts" are the people who work in ConnectCarolina and enter the *most* of a type of transaction over a 12-month period.

Besides recognizing staff who use ConnectCarolina the most, the "Most" lunches give the ConnectCarolina team an opportunity to learn from the attendees what works and what can be improved in the system.

March 9, 2018 "Most" Lunch Recipients

"Most" ePro (Vendor Catalog):

• Alfred Dolge, Department of Pharmacology (1,226)
• Michele Kernodle, Campus Health Administration (769)
• David McSherry, VCFA Financial Shared Services (695)
• Sandy Hufeisen, Department of Pharmacology (589)
• Janice E Brooks, Lineberger Comprehensive Cancer Center (550)
• Sam George, Lineberger Comprehensive Cancer Center (538)
• Chris Hill, Eshelman School of Pharmacy-DPMP (509)
• Jeffrey Campbell, Alcohol Studies Center (465)
• Jeffrey Jones, Biochemistry and Biophysics (440)
• Alyssa Good, Kenan-Flagler Business School (424 transactions)

 Pictured: Krishna Bheemireddy, ConnectCarolina Business Systems Manager, Alfred Dolge, Department of Pharmacology and Fran Dykstra, AVC for Enterprise Applications

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