What’s Changing with the Finance Upgrade?

December 2018
Presenters

Jackie Treschl, ConnectCarolina Change Management

Subject Matter Experts

Becky Arnold, ConnectCarolina Finance
Nicole Šebik, ConnectCarolina Budgeting
Krishna Bheemireddy, ConnectCarolina Procurement
Webinar Format

Presentation followed by question and answer.

Use the chat window to ask a question. We’ll keep track of them and answer them at the end of the presentation.

Orange boxes indicate new functionality.

Green boxes indicate look and feel changes.

The webinar recording will be posted on https://ccinfo.unc.edu/fin-9-2-upgrade/
The ConnectCarolina **Finance** and **HR/Payroll** components will be down beginning at **NOON on Friday, Dec. 7** so that we can begin the Finance software upgrade.

The **Student Administration** pages in ConnectCarolina will be unavailable starting at **10:00 p.m. on Saturday, December 8 until 8:00 a.m. on Sunday December 9**.
Changes to the ConnectCarolina Finance pages
I like the setup. I also like that most items respond much quicker when you click on them.

We don’t see too many differences, not enough to be bothered by.

Everything worked smoothly.

Overall, things seemed intuitive where there were changes.
Upgraded

UNC Favorites puts the most used links at the top in one folder
Supplier is the new Vendor
Suppliers
Campus Voucher: 
Looks Different, Works the Same
Current
Upgraded
Upgraded
Upgraded
Save for Later allows you to save the voucher without a valid chartfield.
Upgraded

Hover on the supplier’s name to see the location
When creating a Voucher Template, click the Template link to save the template.
Upgraded
Purchasing
Recently Ordered lets you see your most recent orders.
<table>
<thead>
<tr>
<th>Item ID</th>
<th>Supplier Item ID</th>
<th>Mfg Item ID</th>
<th>Price</th>
<th>UOM</th>
<th>Supplier Supplier ID</th>
<th>Manufacturer Manufacturer ID</th>
<th>Lead Time</th>
<th>Quantity</th>
<th>Add to Favorites</th>
<th>Add to Template(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>1000.000</td>
<td>Each</td>
<td>USD</td>
<td></td>
<td></td>
<td></td>
<td>Add to Favorites</td>
<td>Add to Template(s)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>79.9900</td>
<td>Each</td>
<td>USD</td>
<td></td>
<td></td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>7.0000</td>
<td>Each</td>
<td>USD</td>
<td></td>
<td></td>
<td></td>
<td>Add to Favorites</td>
<td>Add to Template(s)</td>
</tr>
<tr>
<td>Item ID</td>
<td>Supplier Item ID</td>
<td>Supplier ID</td>
<td>Manufacturer</td>
<td>Manufacturer ID</td>
<td>Quantity</td>
<td>Price</td>
<td>UOM</td>
<td>Lead Time</td>
<td>Add to Favorites</td>
<td>Add to Template(s)</td>
</tr>
<tr>
<td>---------</td>
<td>-----------------</td>
<td>-------------</td>
<td>--------------</td>
<td>----------------</td>
<td>-----------</td>
<td>-------</td>
<td>-----</td>
<td>-----------</td>
<td>------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Test Line 1</td>
<td></td>
<td>FEDEX OFFICE 0000033293</td>
<td></td>
<td></td>
<td></td>
<td>1000.0000</td>
<td>USD</td>
<td></td>
<td></td>
<td>Add to Favorites</td>
</tr>
<tr>
<td>CanaKit Raspberry Pi 3 B+ (B Plus) Starter Kit (32)</td>
<td>B07BC8PK7</td>
<td>AMAZON.COM SERVICES LLC 0000105441</td>
<td></td>
<td></td>
<td>1</td>
<td>79.9900</td>
<td>USD</td>
<td></td>
<td></td>
<td>Add to Favorites</td>
</tr>
<tr>
<td>Mathematica 10.2.0 - Windows (USB 8GB)</td>
<td>414</td>
<td>ITS SOFTWARE ACQUISITION 000000023</td>
<td></td>
<td></td>
<td>1</td>
<td>7.0000</td>
<td>USD</td>
<td></td>
<td></td>
<td>Add to Favorites</td>
</tr>
</tbody>
</table>
Enter information about the non-catalog item you would like to order:

**Item Details**

- **Item Description**
- **Price**
- **Quantity**
- **Category**
- **Currency**: USD

**Supplier**

- **Supplier ID**
- **Supplier Name**
- **Supplier Item ID**

**Manufacturer**

- **Mfg ID**
- **Manufacturer**
- **Mfg Item ID**

**Additional Information**

- **Send to Supplier**
- **Show at Receipt**
- **Show at Voucher**

**Request New Item**

- **Request New Item**: A notification will be sent to a buyer regarding this new item request.

**Add to Cart**
Accounting Lines can be expanded or collapsed.
Checkout - Review and Submit

Review the item information and submit the req for approval.

Requisition Summary

| Business Unit | UNC
| Requester     | treeschl
| Currency      | USD

Requisition Name

Priority: Medium

Cart Summary: Total Amount 16.47 USD

Expand lines to review shipping and accounting details

Requisition Lines

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Sharpie Fine Point Permanent M</td>
<td></td>
<td>STAPLES BUSINESS ADVANTAGE</td>
<td>3.0000</td>
<td>Dozen</td>
<td>5.450</td>
<td>16.47</td>
</tr>
</tbody>
</table>

Mass Change

Select All / Deselect All

Select lines to: Add to Favorites

Add to Template(s)

Delete Selected

Total Amount: 16.47 USD

Shipping Summary

Edit for All Lines

Ship To Location

Address

Attention To: treeschl

Comments

Requisition Comments and Attachments

Enter requisition comments

Send to Supplier

Show at Receipt

Shown at Voucher

Approval Justification

Enter approval justification for this requisition

Check Budget

Pre-Check Budget

Notify

Save & submit

Save for Later

Add More Items

Preview Approvals
Checkout - Review and Submit

Review the item information and submit the req for approval.

Requisition Summary

- Business Unit: UNC at Chapel Hill
- Requester: treeschl
- Currency: USD
- Requisition Name:
- Priority: Medium

Cart Summary: Total Amount 16.47 USD

- Expand lines to review shipping and accounting details

Requisition Lines

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Sharpie Fine Point Permanent M</td>
<td></td>
<td>STAPLES BUSINESS ADVANTAGE</td>
<td>5.0000</td>
<td>Dozen</td>
<td>5.4900</td>
<td>16.47</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Select All / Deselect All
- Select lines to:
  - Add to Favorites
  - Add to Template(s)
  - Delete Selected
  - Mass Change

Total Amount: 16.47 USD

Shipping Summary

- Edit for All Lines
  - Ship To Location
  - Address
  - Attention To: Jackie Treschl
  - Comments

Requisition Comments and Attachments

- Enter requisition comments

  

- Send to Supplier
- Show at Receipt
- Shown at Voucher

Approval Justification

- Enter approval justification for this requisition

  

- Check Budget
  - Pre-Check Budget
  - Notify

Save & submit | Save for Later | Add More Items | Preview Approvals
Save for Later only saves your requisition.
Preview Approvals allows you to see who needs to approve your requisition.
Requisition Settings

**Business Unit**: UNCCH

**Requestor**: trenschl

**Unc at Chapel Hill**: Jackie Treschl

**Requisition Name**: 

**Priority**: Medium

### Default Options

- **Default**: If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
- **Override**: If you select this option, the defaults specified below will override any predefined values for these fields. Only non-blank values are assigned.

### Line Defaults

- **Supplier**: 
- **Supplier Location**: 
- **Category**: 
- **Unit of Measure**: 
- **Buyer**: 

### Shipping Defaults

- **Ship To**: 
- **Due Date**: 
- **Attention**: 

### Distribution Defaults

- **SpeedChart**: 

### Accounting Defaults

<table>
<thead>
<tr>
<th>Dist</th>
<th>Percent</th>
<th>Location</th>
<th>GL Unit</th>
<th>Fund</th>
<th>Source</th>
<th>Account</th>
<th>Dept</th>
<th>PC Bus Unit</th>
<th>Project ID</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>607_2200</td>
<td>UNCCH</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**$211006**

[OK] [Cancel]
New in Budgets
New Feature

Copy a budget transfer by selecting the **Copy Journal** option in the Process dropdown.
New Feature

Canceled means a change has been made to your budget journal or budget transfer. You can make changes to it and resubmit.
New Feature

Check the budget header status to see if budget journal or budget transfer failed budget checking.
New Feature

Chartfield descriptions show in Budget Overview. You can hide them using the Personalize link.
New Feature

Approvers:
Comments are now required if you deny a budget journal or budget transfer.
Helpful Tips
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• **On the Manage Requisitions page**
  – Currently: when you use the clear button, the system clears all fields.
  – Upgraded: when you use the clear button, the dates within the last 90 days remain in the fields.
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  – You can access PAAT, ePARs, and Commitment Accounting related reports from the WorkCenter.
Helpful Tips

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• On the Finance WorkCenter
  – You can access PAAT, ePARs, and Commitment Accounting related reports from the WorkCenter.

• On Purchase Requisitions Mass Change link
  – Be sure the business unit is selected before you make any other changes.
Frequently Asked Questions
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**Question:** Will my Favorites transfer when new updates become effective?

**Answer:** Yes, any favorites you have stored will be available.
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**Question:** Will my Favorites transfer when new updates become effective?

**Answer:** Yes, any favorites you have stored will be available.

**Question:** Do we have to go to the Finance WorkCenter to start or can we use breadcrumbs or favorites?

**Answer:** You can use breadcrumbs or favorites, but we tried to compile the most commonly used pages into the WorkCenter.
Frequently Asked Questions

**Question:** Will vendors be called suppliers in all areas of CC?

**Answer:** Yes (and no). All pages will have the label changes to suppliers. However, there are some places that won’t change such as query names and attachment labels.
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**Question:** What is "Other WorkCenters" used for?

**Answer:** The Other Work Centers link is for Central Offices and is based on the security you have in the system. If you don’t have access to the pages, you won’t see anything when you click the Other WorkCenters link.
Question: When does the outage begin for the upgrade?

Answer: The ConnectCarolina Finance and HR/Payroll components will be down beginning at NOON on Friday, Dec. 7 so that we can begin the Finance software upgrade. The Student Administration pages in ConnectCarolina will be unavailable starting at 10:00 p.m. on Saturday, December 8 until 8:00 a.m. on Sunday December 9.
What Questions Do You Have?
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