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To:

Subject: Dec. 1 -- ConnectCarolina Finance Update
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ConnectCarolina

Finance Division Daily Update

Dec. 1, 2014

This Finance Division Daily Update email is for Business Managers, MOU Leads, Finance TIPs, Finance Campus Working Groups and Finance Division staff. Finance will send these daily updates as needed. Please share with the ConnectCarolina Finance users in your school/division.

Top Issues

October Month-End Close: Central offices continue to work with State-level agencies to complete the transmission and reconciliation of all October transactions, and to obtain approval to officially close the month of October. Additional transactions to chart strings of campus departments for October are not anticipated. Additional transactions for October, if any, are expected to post to Central Office chart strings. In the unlikely event an additional transaction is posted to a campus department chart string, the campus department will be notified and provided details. Once the month of October is deemed to be officially closed, notice of the close will be provided to you.

November Month-End Close: Nov. 24 was the deadline for journal entries to be processed through at least departmental workflow in order to ensure the journal would be posted in November. Central Office (OSR, Accounting Services and the Budget Office) will ensure journals are posted if received by that deadline. *The December accounting month opens today, Dec. 1.*

ARP: *We **strongly encourage** all offices to enter their ARP actions as soon as possible. We are consistently hearing reports that the data entry process is quite time-consuming. Please do not wait until the last minute to enter your actions.* As of this morning, here's where ARP actions stand. These are the actions that have written to the system:

- 444 faculty job change actions (23 percent of planned)
- 622 EPA non-faculty job change actions (39 percent of planned)
- 961 lump sum actions (27 percent of planned)

Some tips from today's 11:30 a.m. ARP call:

Q: After an ARP action has written to the system, can we then go in and use the Fund Swap form to make corrections to the funding sources, including future-dated rows?

A: Yes. After the ARP-related action has executed, you can then go back and make corrections for 12/1 forward, using the Fund Swap form. However, you cannot execute a fund swap before the ARP action has written to the system.

Other Issues:

Campus users who try to access historical actions for employees who were terminated prior to conversion (9/30/14 and before) or any information on those employees may find those are not viewable in ConnectCarolina. In most cases, this is because the employees could not be converted into valid PeopleSoft departments due to changes in the department structure, so they were placed into a special "conversion" department. After EPAWeb is taken offline on Dec. 9, that information will not be accessible to campus users. However, central office users (OHR, APO, etc.) do have the ability to view data for these employees. Campus users should work with the appropriate central office area to get needed information. For general inquiries, HR Records in the Office of Human Resources can also assist.

Tips and Tricks: The following is information about what to do if you receive login errors while trying to access ConnectCarolina:

- Try a second browser. Supported browsers are listed here.
- If you get errors in both browsers, wait a few minutes to see if the problem is a quick server glitch.
- Try both browsers again.
- If you still cannot access ConnectCarolina, please submit a help ticket. If several users in your area are experiencing the same problem, you should call in a critical ticket at 962-HELP.

Important Reminders

New! GradStar: Spring 2015 GradStar dates and deadlines were communicated to campus today.

University Deposits: The following are some upcoming deadlines:

- The deadline for delivering November dated cash/check deposits to the University Cashier in SASB North was 10 a.m. today, Dec. 1. Effective Dec. 2, we will begin processing cash/check deposits with December accounting dates only.
- The deadline for submitting November accounting date electronic deposits into the deposit system is 10 a.m. Tuesday, Dec. 2, so that we can process them for posting to the GL.

Queries Webinar: A set of queries has been created for campus to use in monitoring the status of their department's transactions. A webinar on how to best use these queries is scheduled for Wednesday, Dec. 3, from 11 a.m. – 12 Noon. ***Note: The Campus Query role is automatically given to all users that have other Finance roles. Users don't have to request access for this role.***

ARP Assistance: We continue to hold optional daily calls this week at 11:30 a.m., strictly for ARP questions and assistance. The School/Division TIPs have the dial-in information. The calls are open to anyone who may have questions about ARP.

We are also planning several walk-in opportunities for users to get assistance with ARP actions if needed. Please take note of the following dates and times:

- Monday, Dec. 1: 1:30-3 p.m., ITS Manning Room 2400
- Tuesday, Dec. 2: 1:30-3 p.m., ITS Manning Room 2400
- Wednesday, Dec. 3: 10:30-noon, ITS Manning Room 2400

CBM Demo: A Customer Billing Management (CBM) System and Bill Presentation Demo will take place Tuesday, Dec. 9 from 2 - 3 p.m. in Toy Lounge, Dey Hall.

ViewStar: ViewStar will be decommissioned at 5 p.m. on Wednesday, Dec. 10. When ViewStar is shut down the following legacy systems will no longer have access to attachments/images: ePro 8.9 Small Order Process, Web Travel, Web Vendor, Account Request, Check Request, and InDEPTh.

- If there are any documents *created in Account Request* that you need copies of, you should access them and print them before 5 p.m. on Dec. 10, 2014. All the images in ViewStar have been migrated to ImageNow and are accessible in the Central Offices. We are working on defining processes.
- In the meantime, users can access legacy account request/fund authority information by selecting the Finance Central link at the top right of the Finance Division homepage. From there, users should sign in and go to their Inbox. Then users should select Search UNC and then Account Request. Search by the old Department Number to view the requests.
- *Clarification: The above tip only applies to Account Requests/Fund Authorities that were originally created in the Account Request system which was deployed in 2007. Anything prior to that date is not affected by the decommissioning of ViewStar.*

Questions

All technical questions should be directed to the Business Systems Help Desk at 919-962-HELP, or submitted via a help ticket online at help.unc.edu (select ConnectCarolina > ConnectCarolina Finance > the appropriate area of concern). Your help ticket will be answered by a team dedicated to working on Finance questions and issues. Business Systems Help Desk hours are 8 a.m. to 6 p.m.

Functional or business process questions – plus any tips you have to offer – can be added to the ConnectCarolina user discussion forums.

Suggestions for content can be emailed to janet_kelly-scholle@unc.edu.