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To:

Subject: Dec. 3 -- ConnectCarolina Finance Update  
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ConnectCarolina

## Finance Division Daily Update

### Dec. 3, 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

**New! Bill Presentation:** Telecom charges for October and November journals originally had 9/30/14 and 10/31/14 as the "bill date." Corrections have been made to the bill date to match the date of the journal so you can easily reconcile between Bill Presentation and InfoPorte. Also, in October, Facilities did not process any credit transactions (including mail pre-sort discount) in the ConnectCarolina journal, however these transactions were in Bill Presentation. These transactions have been removed from Bill Presentation and you should see these credits in December in both the journal as well as in Bill Presentation.

**November Month-End Close:** Central Offices (OSR, Accounting Services and the Budget Office) should conclude processing November transactions this week and will ensure journals are posted if received by the deadline to be processed through departmental workflow which was November 24.

**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.

**ARP:** *The ARP data entry deadline is Monday, Dec. 8 at 5 p.m. Employee actions that are not entered by that deadline will result in the ARP not being paid to those employees on Dec. 23.*

Here are the statistics as of this morning. Since we are now **past the halfway point of the data entry period**, these numbers should begin to climb rapidly. These are the actions that have written to the system:

- 707 faculty job change actions (36 percent of planned)
- 1103 EPA non-faculty job change actions (68 percent of planned)
- 1724 lump sum actions (48 percent of planned)

**System Availability Update:** ConnectCarolina Finance and HR/Payroll system availability will be extended two hours per business day through Friday, Dec. 5 to support ARP efforts. Also, there will be no system down time this weekend. The regular system availability times will be reinstated for business days beginning Monday, Dec. 8. Following is the schedule for the next week:

- Monday-Friday, Dec. 1-5 from 7 a.m. – 9 p.m.
- Saturday, Dec. 6 from 3 a.m. through Midnight, Sunday, Dec. 7 (no system downtime)
- Monday-Friday, Dec. 8-12 from 7 a.m. – 7 p.m. (revert to regular system hours)
- **Reminder: The deadline for completing ARP actions is 5 p.m. Dec. 8.**

#### Known Issues and workarounds:

- Many originators have commented that **Job Change actions with future-dated funding grids** are taking a long time to enter. This is because all grids must be updated with the ARP information, and that can take significantly more time for employees with many funding sources and/or future-dated grids. You may want to discuss this with your Finance representative and consider the following workaround, **which may save you some time:**
  - First, make sure that the 12/01/2014 funding grid is updated with all of the correct funding sources for the ARP.
  - Then, in each of the future-dated funding grids, assign the entire amount of the ARP increase to the row that

has the description of “EE - NC Suspense.” This will allow you to complete the action without fully updating every line of every grid.

- o The result is that, in 2015, a funding swap form will need to be completed on anyone for whom this was done in order to redistribute the amounts in suspense. Since these future Fund Swap actions will need to be completed even without an ARP action, this workaround does not add any work.
- Many originators are entering Lump Sum actions and placing them on hold so their Finance experts can review them before submitting. If originators are entering **multiple chartfield strings to create combo codes** for these actions, then the actions cannot be put on hold. This is because blank combo codes are seen as duplicates, and the form must be submitted for combo codes to be created. Lump Sum actions with one blank combo code, or none, can be put on hold.
- Make sure you validate your data entry and check for errors and typos before you submit. **If you realize you have made a mistake on a submitted action, you must submit a ticket and the correction will have to be made by the project team.**

**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 ConnectCarolina 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:**

- Remember that typing in combo codes rather than the full chart field string on the ePAR forms can speed up data entry. This could be especially helpful when entering a high volume of ARP actions.

## Important Reminders

**New! Query Viewer:** The materials from today’s webinar on Managing Finance Transactions Using Query Viewer are posted online:

- Webinar slides: <http://ccinfo.unc.edu/training/resource-documents/#Slideshows>
- Webinar guide: <http://ccinfo.unc.edu/training/resource-documents/#Finance>

**New! Friday’s in-person TIP meeting:** Both the HR/Payroll and Finance TIP meetings will take place in Toy Lounge, Dey Hall.

- The HR TIP meeting is at 10 - 10:45 a.m.
- The Finance TIP meeting is at 11 - 11:45 a.m.

**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.

**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](http://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](mailto:janet_kelly-scholle@unc.edu).*