

## Chartfields 101

### Entering Source Chartfield Value Requests

By the end of this webinar, you should be familiar with:

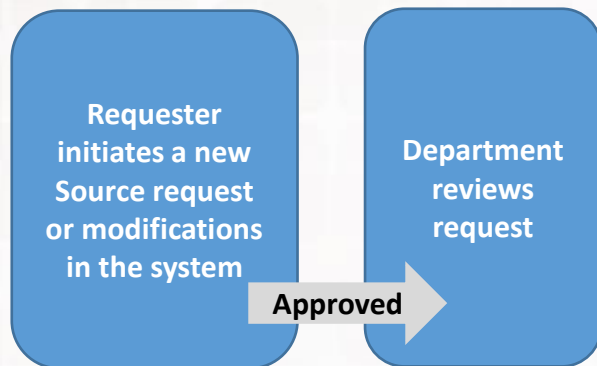
- Source request process
- Types of source requests
- How to create Source requests in ConnectCarolina
- How you will know when a new Source is available to use in ConnectCarolina

### Source Request Workflow

Requester  
initiates a new  
Source request  
or modifications  
in the system

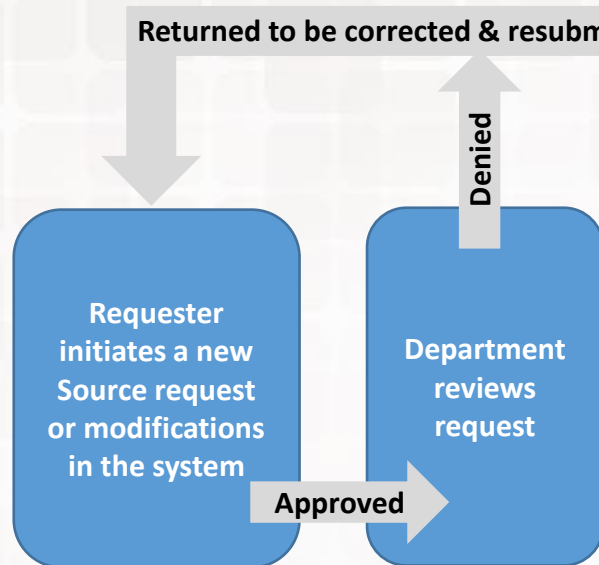
- Starts with someone entering a source request in ConnectCarolina
- This can be a new source request or a change to an existing source request

### Source Request Workflow



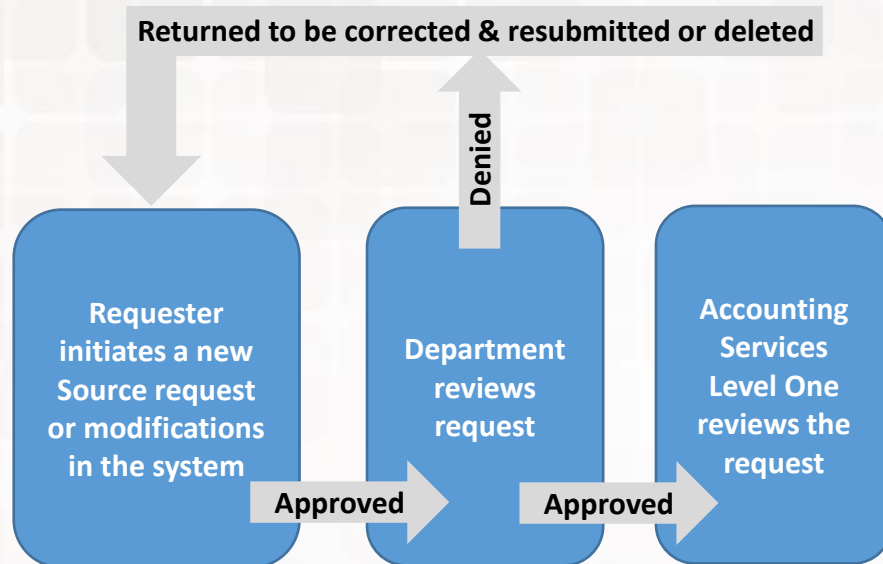
- Requester submits the source request for approval
- Depending on your school or division, you may have more than one department approver

## Source Request Workflow



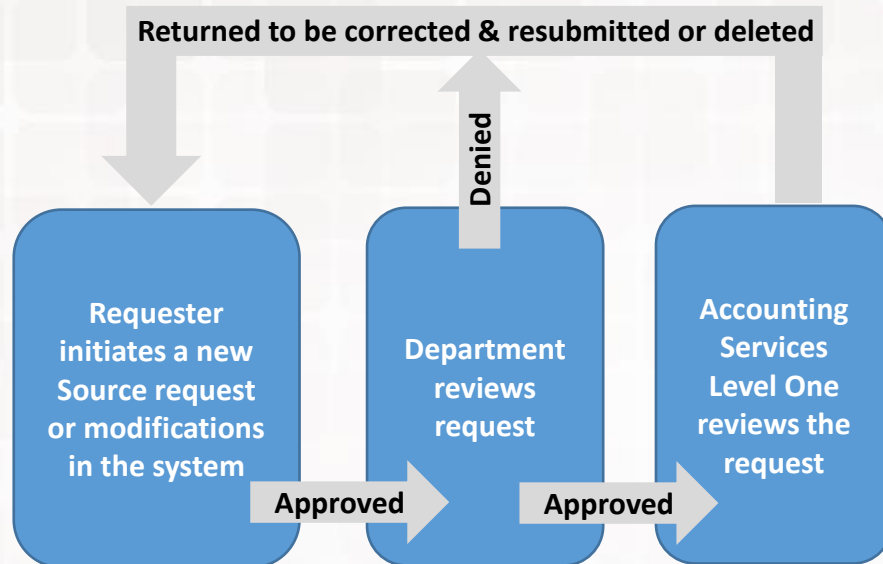
- If the department denies the request, it is routed back to the requester to be corrected and re-submitted or deleted

## Source Request Workflow



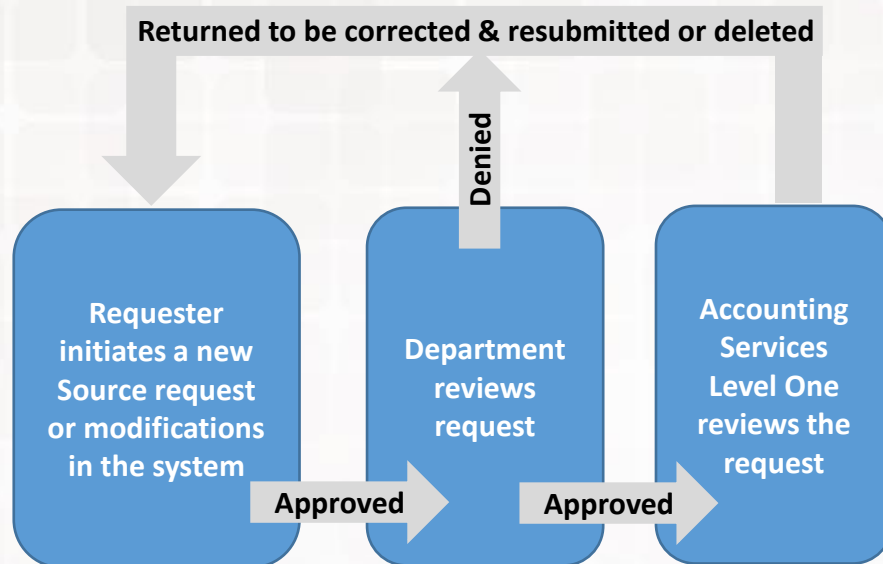
- If the department approves the request, it is routed Accounting Services

## Source Request Workflow



- Accounting Services has a team assigned to different source request categories
- If the source is denied, it is routed back to the requester to be corrected and re-submitted or deleted

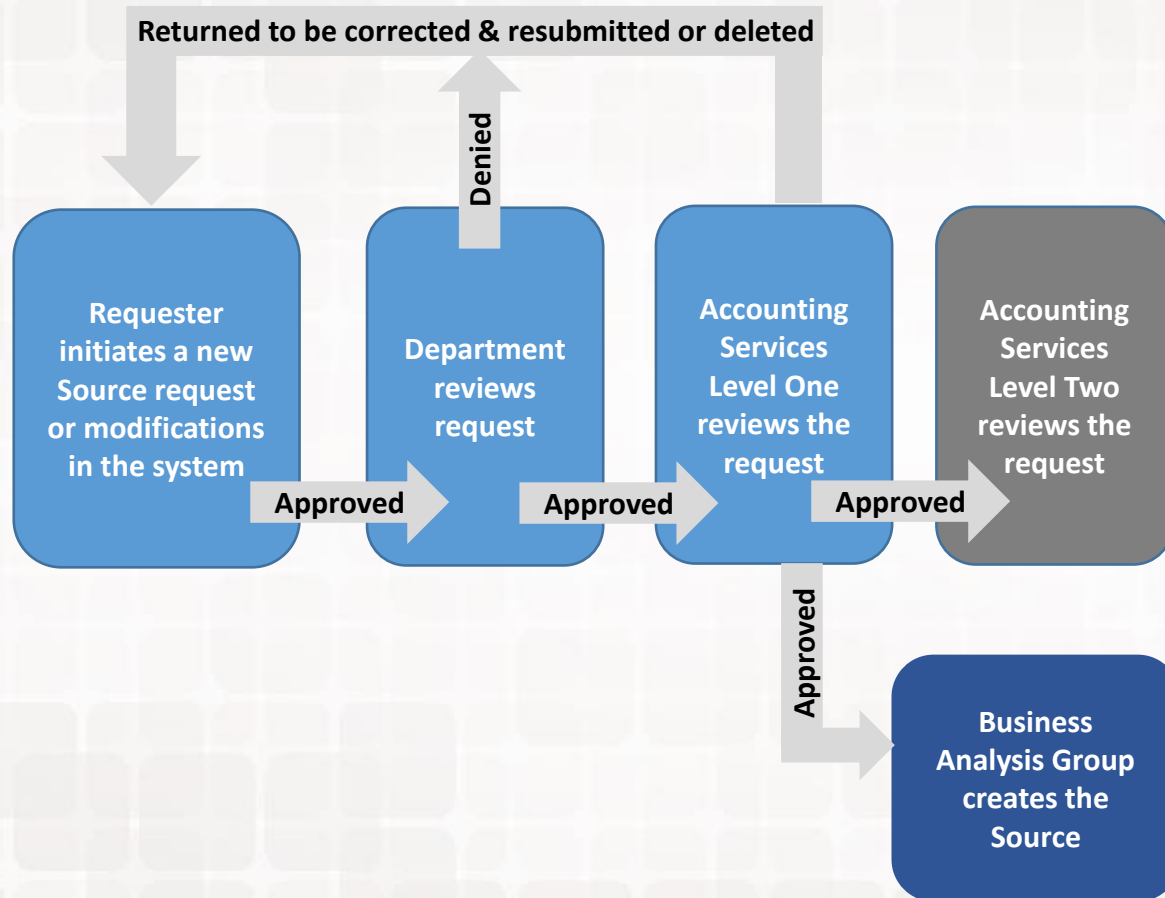
## Source Request Workflow



- If Accounting Services sees that the source request is in order, they enter the source description, terms and instructions, and source attributes
- And then they approve the source request



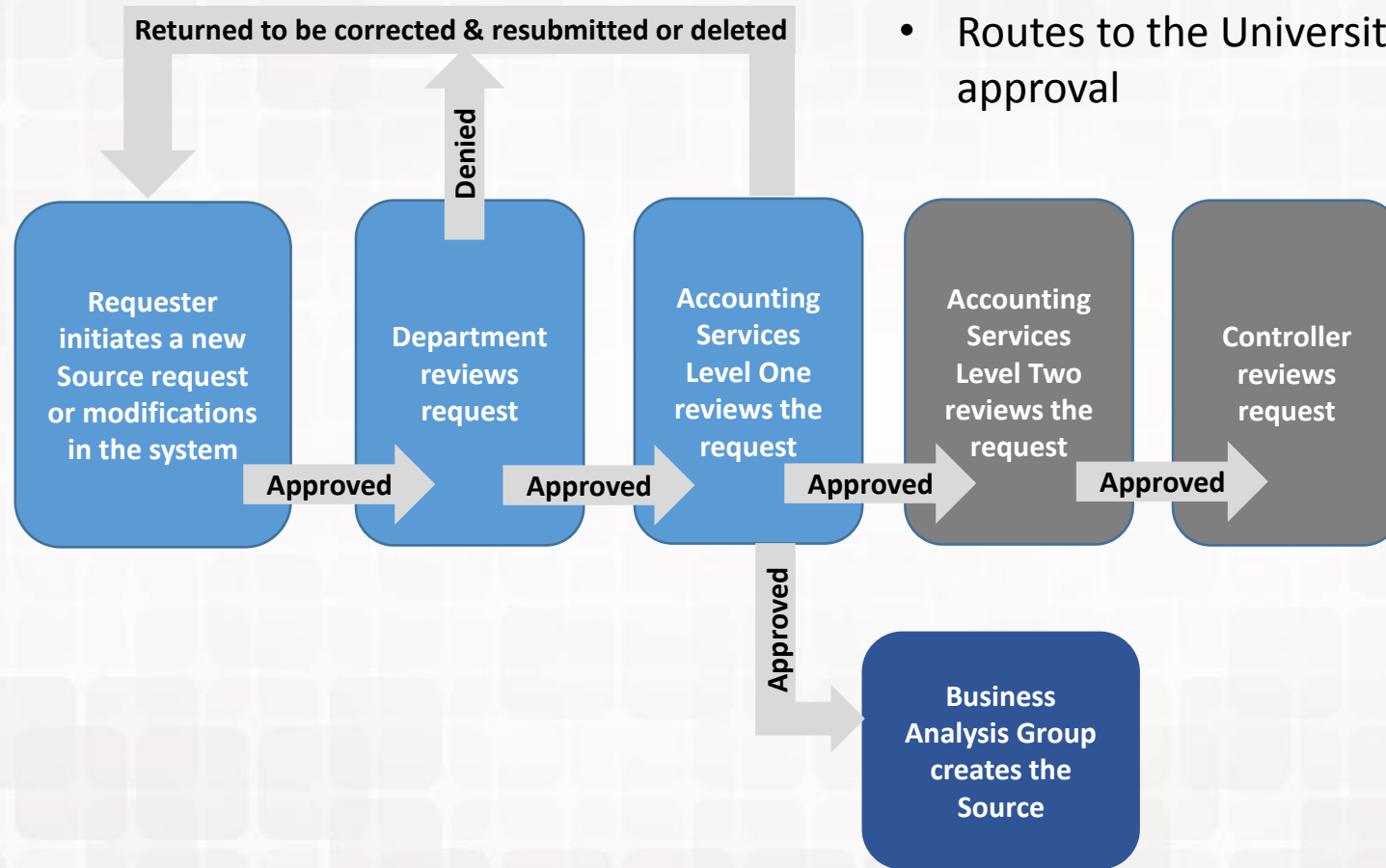
## Source Request Workflow



The approved source request is routed to two places:

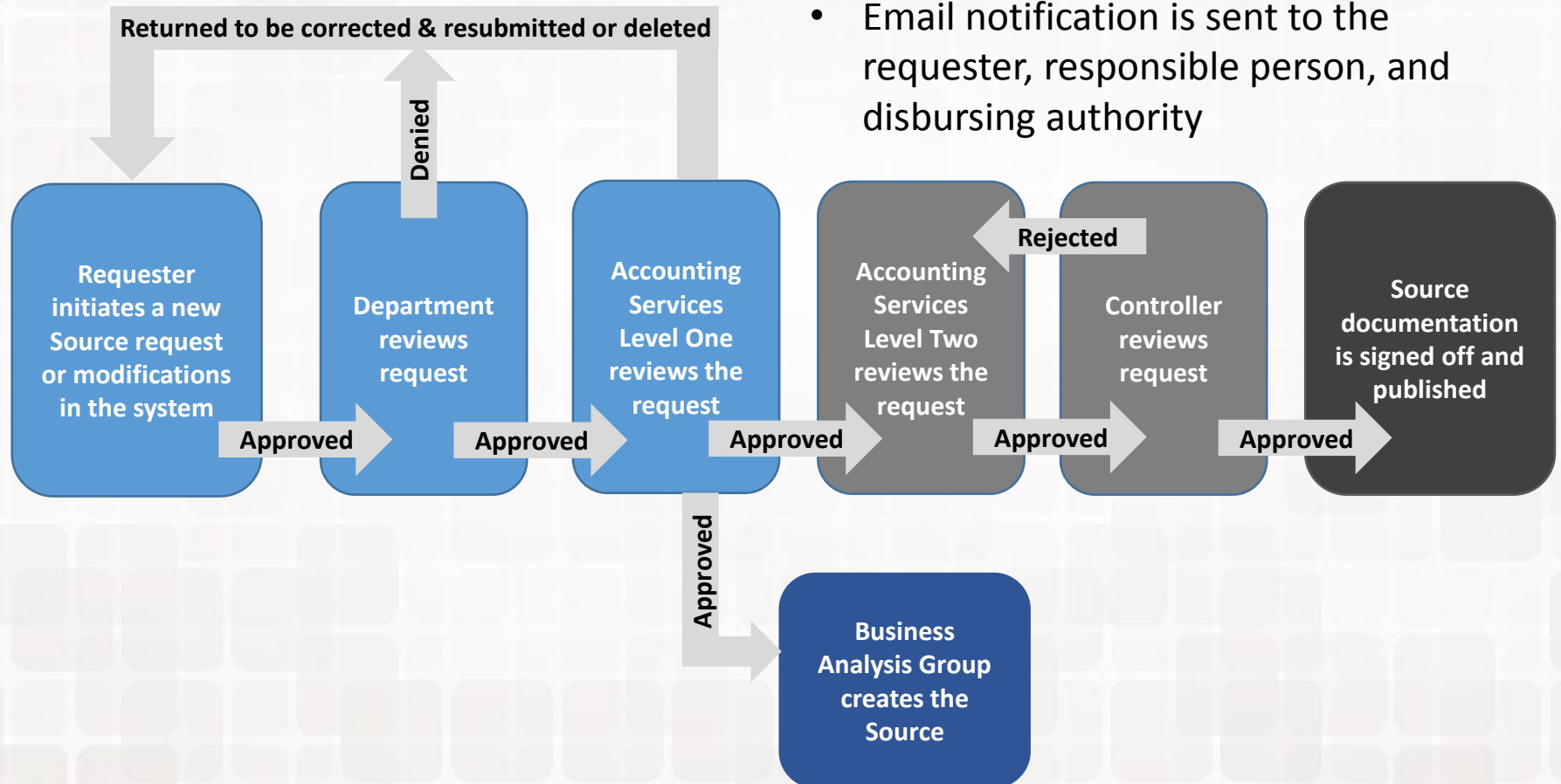
- The Business Analysis Group, who creates the source in ConnectCarolina
- Accounting Services Level Two, who reviews and modifies as necessary, information to be included on the Fund and Source Authority document

## Source Request Workflow



- Accounting can only approve a source request
- Routes to the University Controller for approval

## Source Request Workflow



The University Controller can:

- Reject it and send it back for revision by Accounting Service Level Two
- Electronically sign and publish the Fund and Source Authority
- Email notification is sent to the requester, responsible person, and disbursing authority

## Types of Source Chartfield Requests

**Create a new  
source**

**Update an  
existing  
source**

**Delete a  
source**

**Deactivate  
a source**



**Create a new  
source**

Used when a new source of funding is received by the University.

Information required to enter a new source request includes:

- Request categories and types
- Responsible person
- Disbursing authority
- Source title
- Justification
- Minimum one attach document

Deactivate  
a source

# Source Create Information on the Finance Division Website

Division of Finance and Administration

THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

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[Libraries](#)

[Maps](#)

[Departments](#)

[ConnectCarolina](#)

[Search »](#)

## FINANCE DIVISION

UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

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Select a Finance Department



### SOURCE CREATE INFORMATION

[Finance Home](#) » Source Create Information

## Source Create Information

- › [Source Create Help Matrix](#)
- › [Source Create Attribute Form](#)
- › [Data Naming Standards](#)

[↑ TOP](#)



THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL

University Controller  
Procurement Services

[For Finance Division Employees](#)

Student Accounts and  
University Receivables

[Internal Controls](#)

[Editor Login](#)

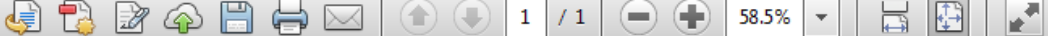
Treasury and Risk  
Management Services

[Communications and Training](#)

# Source Create Help Matrix

	A	B	C	D	E	F	G
1		<b>PeopleSoft Source Create Help</b>					
2		18-Mar-14					
3	<b>Request Category</b>	<b>Source Category</b>	<b>Source sub-category</b>	<b>Description</b>	<b>Who can Submit</b>	<b>Add'l Info Needed</b>	<b>Type of Attachment Needed</b>
4							
5		<b>Central Offices, Unrestricted, Assets and</b>					
6	00		Bank Balancing Funds	N/A	University Controller	N/A	N/A
7	01		Clearing and Other Unrestricted University Funds	N/A	University Controller	N/A	N/A
8	02		Financial Reporting - GASB 4340 (inc. Blending)	N/A	University Controller	N/A	N/A
9	05		Payroll Liabilities	N/A	University Controller	N/A	N/A
10		<b>Petty Cash</b>	Petty Cash	University gives money to department for research subject payments; they reimburse University	All UNCCH Departments	N/A	Petty Cash Signature Form
11	103	<b>Imprest Checking</b>	Imprest Checking - Central Office and Departmental	Use with Bank of America bank account; University gives money to department; they reimburse University	All UNCCH Departments	N/A	Bank of America Signature Card
12	142	<b>Student Fees</b>		Money collected by the university to support extracurricular activities of students	Cashiers Office	Indicate purpose of funds	Memo indicating Board approval for the student fee
13	142a		Student Fees Clearing	Fees collected by a Central office and distributed to the All UNCCH Departments	Cashiers Office	Indicate purpose of funds	Memo indicating Board approval for the student fee
14	142b		Student Fees Departmental	Fees collected directly by the department	All UNCCH Departments	Indicate purpose of funds	Memo indicating Board approval for the student fee
15	142c		Student Fees BOG Directive 2013	Fees collected by the department under the 2013 Board of Governor's action	All UNCCH Departments	Indicate purpose of funds	Memo indicating Board approval for the student fee
16	15	<b>Unrestricted Gifts, Devises, or Bequests</b>	N/A	Monies received by the University as gifts, devises, or bequests that are not presumed more designated to be gifts, devises, bequests to the endowment fund of the University, and which have no restrictions placed on their use by the donor	UNCCH Development Office	N/A	Donor Agreement
17	160	<b>Residuals</b>	N/A	Funds remaining after a contract or Grant (OSR or non-OSR) has expired and where these funds are not required to be returned to the the grantor	All UNCCH Departments	Source code providing the transfer of funds	Copy of contract or grant document indicating funds do not need to be returned, or statement from OSR indicating there are no further claims on the funds
18	165	<b>Conferences, Study Abroad, Admin Fees (inc. clinical trials)</b>					
19	165a		Study Abroad Programs	Source create for all programs in Study abroad office	Study Abroad Office, CAS Dean's Office	N/A	Memo indicating purpose
20	165b		Conference, Workshops, Seminars	University All UNCCH Departments receiving conference, special event, workshop, or seminar registrations fees or sponsorships. Not for use with classes offering educational credits.	All UNCCH Departments	Expected type of income: registration fees, internal support, external support	Website address, copy of flyer, or registration form
21	165c		Administrative Fees (Inc. fees for Clinical Trials)	Internally charged fees to other University All UNCCH Departments for various services rendered; approved through University Controller's Office	All UNCCH Departments	Purpose of the fee	Memo indicating approval of the fee by University Controller








# Source Create Attribute Form



Tools

Fill & Sign

Comment



Source Request Attribute

Please supply the appropriate information for the below attributes as they pertain to the source code you are requesting. Once you have completed this form, please save it and attach it to your source request.

ATTRIBUTE	ATTRIBUTE VALUE	JUSTIFICATION	COMMENTS
Associated Revenue Flag	No		
Department ID		N/A	
FASB Expense Class	N/A = Not Assigned	N/A	
Source Restriction	00 = No Donor Restriction	N/A	

Document Number: SC001

1 of 1

Sign In

▼ Export PDF

Adobe ExportPDF

Convert PDF files to Word or Excel online.

Select PDF File:

source\_create\_attribute\_form...

1 file

Convert To:

Microsoft Word (\*.docx)

Recognize Text in English(U.S.)  
[Change](#)

Convert

► Create PDF

► Send Files

► Store Files



## P/S Data Naming Standards Recommendations

### Exhibit A - Recommended Abbreviations

#### A

ACAD	Academic
ACCS	Access
ACCT	Account
ACCTG	Accounting
AP	Accounts Payable
AR	Accounts Receivable
ACRD	Accredited
ACR	Accrual
ACCUM	Accumulated/Accumulation/Accumulative
ACQ	Acquisition
ACTVY	Activities
ACTL	Actual
ADDL	Additional
ADJ	Adjustment
ADMN	Administration
ADMS	Admissions
ADV	Advance
ADVERT	Advertising
AFFL	Affiliate/Affiliation
AGCY	Agency
AGNT	Agent
AGRMT	Agreement
ALLOC	Allocate/Allocation
ALLOW	Allowance

ASSOC	Association
ASMP	Assumption
ATHL	Athletic
ATCH	Attach
ATMPT	Attempt
ATND	Attend/Attendance
ATTN	Attention
ATTR	Attribute
AV	Audiovisual
AUDT	Audit/Audited
AUTH	Authority/Authorize
AUX	Auxiliary
AVL	Available/Availability
AVG	Average
AWRD	Award/Awards

#### B

BAL	Balance
BNK	Bank
BEGN	Begin/Beginning
BNFT	Benefits
BILL	Bill/Billing
BRD	Board
BND	Bond
BRK	Break
BRD	Product

An orange rounded square with a white border, containing the text "Update an existing source".

### Update an existing source

Examples of updates to an existing source, include:

- A new responsible person
- A new disbursing authority
- Updates to the terms and instructions
- Updates to supporting documentation

**You can update existing sources that have been approved.**



### Delete a source

Able to delete a new source request or an update to an existing source request:

- Before it is submitted for approval
- Deletes the new source requests from the system
- Maintains a source history for existing sources, but deletes the requested update

**If the new source has been submitted for approval, you can contact the department approver or Accounting Services to deny**

**If the source request is approved by Accounting Services, then use the deactivation process.**



### Deactivate a source

After a source is created, a department can request to deactivate a source:

- Due to changes to funding, or terms and instructions
- Or, to remove a newly created source that will not be used

**Once a source is deactivated, it can't be reactivated in the system.**



**Create a  
new  
source**

Main Menu > Finance Menu > UNC Campus > Source Create > Source Request > Add/Change Source

The screenshot displays a web application interface with a navigation menu. The menu is structured as follows:

- Navigation Bar:** Includes "Favorites", "Main Menu", and a date "09/30/2014".
- Left Sidebar:** Contains icons and labels for "SelfSer", "Student Information", "Finance", "HR/Payroll", and "General Links".
- Main Menu:** A dropdown menu with the following items:
  - Finance Menu
  - HR/Payroll Menu
  - Student Admin Menu
  - Worklist
  - FS Workcenter
  - HR WorkCenter
  - SIA Workcenter
- UNC Campus:** A sub-menu item under "Finance Menu" with the following items:
  - UNC Custom
  - Employee Self-Service
  - Manager Self-Service
  - Customers
  - Vendors
  - Purchasing
  - eProcurement
  - Services Procurement
  - Billing
  - Accounts Receivable
  - Accounts Payable
  - Asset Management
  - Commitment Control
  - General Ledger
  - Set Up Financials/Supply Chain
  - Enterprise Components
  - Worklist
  - Tree Manager
  - Reporting Tools
  - PeopleTools
  - My Personalizations
- Source Create:** A sub-menu item under "UNC Campus" with the following items:
  - Campus Journals
  - Source Create
  - Campus Vendor
  - Departmental Workflow Config
  - Independent Contractor
- Source Request:** A sub-menu item under "Source Create" with the following items:
  - Add/Change Source
- My Worklist:** A section on the right side of the page showing a list of items:
  - HR: Notification Job Change (1)
  - HR: Notification Hire (13)
  - HR: Approval Hire (2)

## Source Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

### ▼ Search Criteria

SetID:	begins with ▾	UNCCH	×	
Business Unit:	begins with ▾			
Request category:	begins with ▾			
Request type:	begins with ▾			
Request Id:	begins with ▾			
Source:	begins with ▾			
Status:	begins with ▾			
Requester Id:	begins with ▾			

☐ Include History  
 ☐ Case Sensitive

Search

Clear

Basic Search



Save Search Criteria

[Favorites](#) ▾

[Main Menu](#) ▾ >

[Finance Menu](#) ▾ >

[UNC Campus](#) ▾ >

## Source Request

[Find an Existing Value](#)

[Add a New Value](#)

Business Unit:  

Request category:  

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)



[Favorites](#) ▾

[Main Menu](#) ▾ >

[Finance Menu](#) ▾ >

[UNC Campus](#) ▾ >

## Source Request

[Find an Existing Value](#)

[Add a New Value](#)

Business Unit:  


Request category:  

Add

[Find an Existing Value](#) | [Add a New Value](#)


Source Request

Source Approvals

SetID: UNCCH Request category: 165 Conf,Rest Fdn Grant,Study Abrd Source Code: Request Id: NEXT ?  
Business Unit: UNCCH Request type: 165B  Conference, Workshops, Seminar Add a change request

Source Request

Find | View All First  1 of 1  Last

\*Effective Date: 09/30/2014 

Questionnaire

  Print Source Approvals

Request Details

Status: In Progress

\*Requester ID:  

\*Phone:  \*Email ID:


\*Responsible person:   Tskilas, Lynne

\*Department ID:  

\*Title:  

\*Phone:  \*Email ID:  \*Campus Box:

\*Disbursing Authority ID:  

\*Department ID:  

\*Title:  

\*Phone:  \*Email ID:  \*Campus Box:

\* Use the Source  
Create Help Matrix

Source Request

Source Approvals

SetID: UNCCH Request category: 165

Conf, Rest Fdn Grant, Study Abrd

Source Code:

Request Id: NEXT



Business Unit: UNCCH Request type: 165B



Conference, Workshops, Seminar

Add a change request

### Source Request

\*Effective Date: 09/30/2014



Questionnaire

Print

#### Request Details

Status: In Progress

\*Requester ID:



\*Phone:

\*Email ID:

\*Responsible person:  Tskilas, Lynne



\*Title:

\*Phone:

\*Email ID:

\*Disbursing Authority ID:



\*Department ID:



\*Title:

\*Phone:

\*Email ID:

\*Campus Box:

\* This is the effective of the source request, not the Fund and Source Authority document.

Source Request

Source Approvals

SetID: UNCCH Request category: 165

Conf,Rest Fdn Grant,Study Abrd

Source Code:

Request Id: NEXT



Business Unit: UNCCH Request type: 165B



Conference, Workshops, Seminar

Add a change request

## Source Request

Find | View All

First 1 of 1 Last

\*Effective Date: 09/30/2014



Questionnaire

Print Source Authority



### Request Details

Status: In Progress

\*Requester ID:



\*Phone:

\*Email ID:

\*Responsible person:  Tskilas, Lynne



\*Department ID:

\*Title:



\*Phone:

\*Email ID:

\*Campus Box:

\*Disbursing Authority ID:



\*Department ID:



\*Title:



\*Phone:

\*Email ID:

\*Campus Box:

\* Based on the request category

## Questionnaire

### Questionnaire

Find | View All

First ◀ 1 of 1 ▶ Last

Effective Date: 09/30/2014

#### Question

Question: Conference Receipts

- Answer:
- ☒ Conference Registration Feed
  - ☒ Conference Internal Transfer
  - ☒ Conference External Support
  - ☒ Administrative fees

#### Question

Question: Estimated Total Annual Receipts (e.g. 50000)

Answer: 10000

OK

Cancel

Source Request

Source Approvals

SetID: UNCCH Request category: 165

Conf, Rest Fdn Grant, Study Abrd

Source Code:

Request Id: NEXT



Business Unit: UNCCH Request type: 165B



Conference, Workshops, Seminar

Add a change request

Source Request

Find | View All

First 1 of 1 Last

\*Effective Date: 09/30/2014



Questionnaire

Print Source Authority



Request Details

Status: In Progress

\*Requester ID: 700009990



Lerner, David

\*Phone: 919/555-1234

\*Email ID: dlemer@unc.edu

\*Campus Box: 1234



\*Responsible person:

\*Department ID:

\*Title:

\*Phone:

\*Email ID:

\*Campus Box:

\*Disbursing Authority ID:

\*Department ID:

\*Title:

\*Phone:

\*Email ID:

\*Campus Box:

Source Request

Source Approvals

SetID: UNCCH Request category: 185 Conf,Rest Fdn Grant,Study Abrd Source Code: Request Id: NEXT ?  
Business Unit: UNCCH Request type: 185B Conference, Workshops, Seminar Add a change request

Source Request

Find | View All First 1 of 1 Last

\*Effective Date: 09/30/2014

Questionnaire

Print Source Authority

Request Details

Status: In Progress

\*Requester ID: 700009990 Lerner, David

\*Phone: 919/555-1234

\*Email ID: dlerner@unc.edu

\*Campus Box: 1234

\*Responsible person: 700009991 Quimby, Paul

\*Department ID: 200300 Innovation and Entrepreneurshp

\*Title: Director

\*Phone: 919/555-1234

\*Email ID: pquimby@unc.edu

\*Campus Box: 1234 X

\*Disbursing Authority ID:

\*Department ID:

\*Title:

\*Phone:

\*Email ID:

\*Campus Box:

Source Request

Source Approvals

SetID: UNCCH   Request category: 165   Conf,Rest Fdn Grant,Study Abrd   Source Code:   Request Id: NEXT ?  
 Business Unit: UNCCH   Request type: 165B 🔍   Conference, Workshops, Seminar   Add a change request

Source Request

[Find](#) | [View All](#)  
 First ◀ 1 of 1 ▶ Last

\*Effective Date: 09/30/2014 📅

Questionnaire

Print Source Authority

Request Details

Status: In Progress

\*Requester ID: 700009990 🔍 Lemer, David

\*Phone: 919/555-1234

\*Email ID: dlemer@unc.edu

\*Campus Box: 1234

\*Responsible person: 700009991 🔍 Quimby, Paul

\*Department ID: 200300 🔍 Innovation and Entrepreneurship

\*Title: Director ▼

\*Phone: 919/555-1234

\*Email ID: pquimby@unc.edu

\*Campus Box: 1234

\*Disbursing Authority ID: 700009992 🔍 Mendolison, Andrea

\*Department ID: 200300 🔍 Innovation and Entrepreneurship

\*Title: Dean ▼

\*Phone: 919/555-1234

\*Email ID: amendel@unc.edu

\*Campus Box: 1234 ✕



SetID: UNCCH Request category: 165

Conf,Rest Fdn Grant,Study Abrd

Source Code:

Request Id: NEXT



Business Unit: UNCCH Request type: 165B



Conference, Workshops, Seminar

[Add a change request](#)

## Source Request

[Find](#) | [View All](#)

First 1 of 1 Last

\*Effective Date: 09/30/2014

[Questionnaire](#)[Print Source Authority](#)

## Request Details

Status: In Progress

\*Requester ID: 700009990



Lerner, David

\*Phone: 919/555-1234

\*Email ID: dlerner@unc.edu

\*Campus Box: 1234

\*Responsible person: 700009991



Quimby, Paul

\*Department ID: 200300



Innovation and Entrepreneurship

\*Title: Director

\*Phone: 919/555-1234

\*Email ID: pquimby@unc.edu

\*Campus Box: 1234

\*Disbursing Authority ID: 700009992



Mendolson, Andrea

\*Department ID: 200300



Innovation and Entrepreneurship

\*Title: Dean

\*Phone: 919/555-1234

\*Email ID: amendel@unc.edu

\*Campus Box: 1234

\*Description: Ecom Confr



\*Descrlong (e.g.Purpose):

Fund shall be used to cover all expenses related to the confernece, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.



\*Source:

Funding comes from registration fees, or internal and external sponsorships.



\*Justification:

Regional conference to build ecommerce in the Research Triangle.



Source Title: Ecommerce Conference



\* Attachments can be a PDF, Microsoft Office document, png or a jpeg



(e.g. purpose): related to the conference, workshop, or seminar, including food and beverages, rooms, specific event. ✓

\*Source: Funding comes from registration fees, or internal and external sponsorships. ✓

\*Justification: Regional conference to build ecommerce in the Research Triangle. ✓

Source Title: Ecommerce Conference x ✓

Associated Documents

Personalize   Find    			
Attached File		Attach	First 1 of 1 Last
1		Attach	+ -

\* This only saves  
the source request  
– does not submit it  
for approval

\*Description:

Ecom Confr

\*Descrlong  
(e.g.Purpose):

Fund shall be used to cover all expenses related to the conferne  
amenities for event. Fund not used for a specific event.

\*Source:

Funding comes from registration fees, or internal and external sp

\*Justification:

Regional conference to build ecommerce in the Research Trian

Source Title:

Ecommerce Conference

#### Associated Documents

Personalize | Find | First 1 of 1 Last

Attached File

View

Delete

1 ecom\_fall\_14\_source\_attributes\_ds\_(2).pdf

View

Delete

+

-

Delete Request



Save



Notify



Add



Update/Display



Include

### Step one

- Added a new source request

### Step two

- Entered the request type
- Completed the questionnaire

### Step three

- Entered the requester, responsible person, & disbursing authority

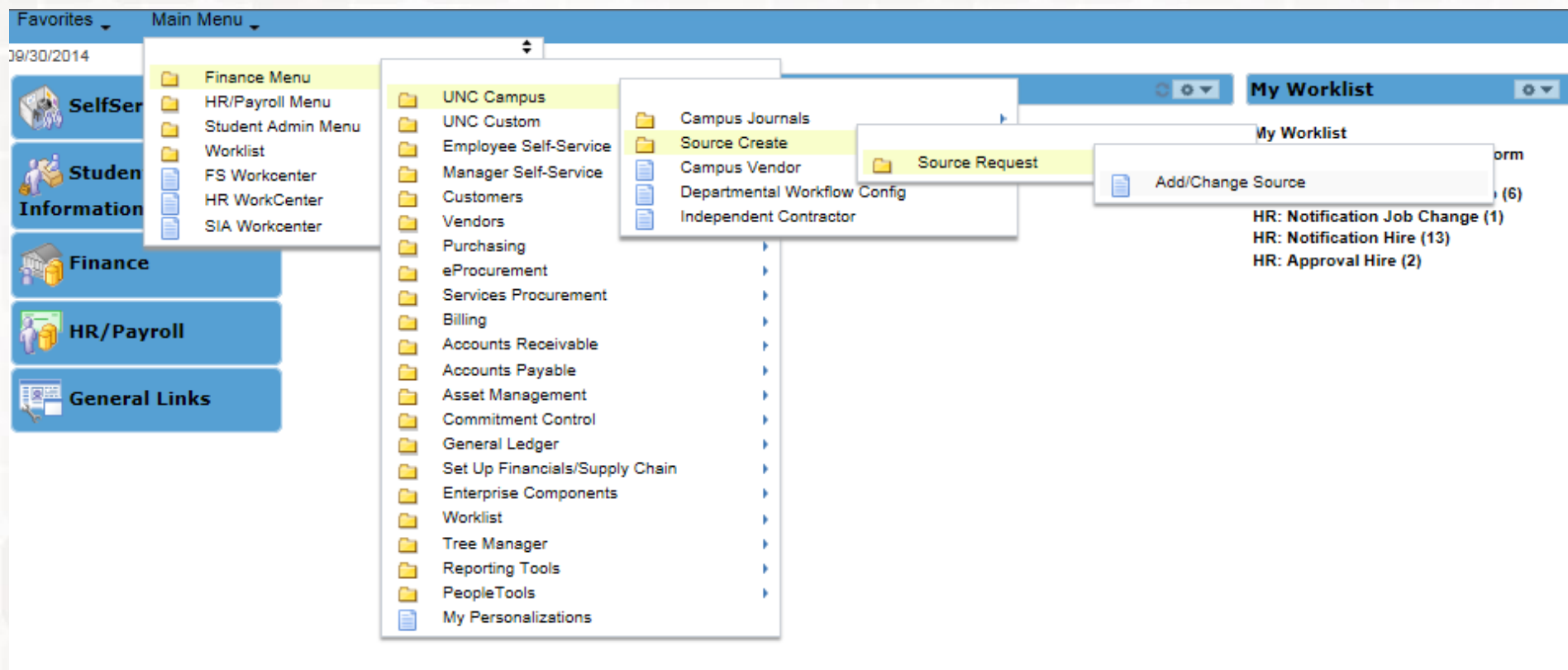
### Step four

- Entered source information
- Attached documents
- Saved the source request

A large orange rounded square button with a white border, centered on a light gray background with a subtle grid pattern. The button contains the text "Update an existing source" in white, bold, sans-serif font.

**Update an  
existing  
source**

Main Menu > Finance Menu > UNC Campus > Source Create > Source Request > Add/Change Source



## Source Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

### ▼ Search Criteria

SetID: begins with ▼ UNCCCH 🔍

Business Unit: begins with ▼ 🔍

Request category: begins with ▼ 165 🔍

Request type: begins with ▼ 165B 🔍

Request Id: begins with ▼ 🔍

Source: begins with ▼ 🔍

Status: begins with ▼ 🔍

Requester Id: begins with ▼ 🔍

☐ Include History ☐ Case Sensitive

Search

Clear

Basic Search



Save Search Criteria

## Source Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

▼ Search Criteria

SetID:	begins with ▼	UNCCH	🔍
Business Unit:	begins with ▼		🔍
Request category:	begins with ▼		🔍
Request type:	begins with ▼	165	🔍
Request Id:	begins with ▼		🔍
Source:	begins with ▼		🔍
Status:	begins with ▼		🔍
Requester Id:	begins with ▼		🔍

☐ Include History ☐ Case Sensitive

Search

Clear

Basic Search



Save Search Criteria

## Search Results

View All


First 1-6 of 6 Last

SetID	Business Unit	Request category	Request type	Request Id	Source	Status	Requester Id
UNCCH	UNCCH	165	165B	FR000000007 (blank)	In Progress		700012219
UNCCH	UNCCH	165	165B	FR000000005	16828	University Controller Approved	700012219
UNCCH	UNCCH	165	165B	FR000000004 (blank)	In Progress		700013128
UNCCH	UNCCH	165	165B	FR000000003 (blank)	Department Approved		700013564
UNCCH	UNCCH	165	165B	FR000000002 (blank)	Department Approved		700013564
UNCCH	UNCCH	165	165B	FR000000001 (blank)	Department Approved		700013564

\* Must have the status of University Controller Approved





[Source Request](#)
[Accounting Services](#)
[Business Analyst Checklist](#)
[Source Approvals](#)

SetID: UNCC Request category: 165 Conf,Rest Fdn Grant,Study Abrd Source Code: 16828 Request Id: FR000000005   
 Business Unit: UNCC Request type: 165B Conference, Workshops, Seminar
 [Add a change request](#)

### Source Request

[Find](#) | [View All](#)
 First  1 of 2  Last

\*Effective Date: 10/01/2014 
[Questionnaire](#)
[Print Source Authority](#)
☐ Deactivate Source code 

### Request Details

<b>Status:</b>	University Controller Approved		
<b>Requester ID:</b>	700009990	Lemer, David	
<b>Phone:</b>	919/555-1234	<b>Email ID:</b> dlemer@unc.edu	<b>Campus Box:</b> 1234
<b>Responsible person:</b>	700009993	Collins, Lara	<b>Department ID:</b> 302100 Academic Advising
<b>Title:</b>	Other		
<b>Phone:</b>	919/555-1234	<b>Email ID:</b> lcollins@unc.edu	<b>Campus Box:</b> 1234
<b>Disbursing Authority ID:</b>	700009994	Nickleson, Tamara	<b>Department ID:</b> 302100 Academic Advising
<b>Title:</b>	Other		
<b>Phone:</b>	919/555-1234	<b>Email ID:</b> trickleson@unc.edu	<b>Campus Box:</b> 1234

**Description:** NCCEOP Confr  
**Descrlong (e.g.Purpose):** Fund shall be used to cover all expenses related to the confernece, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.

**Source:** Funding comes from registration fees, or internal and external sponsorships.

**Justification:** This is for the NCCEOP Upward Bound Academic Symposium & College Fair.

**Source Title:** NCCEOP Upward Bound Academic Symposium & College Fair

Source Request

Accounting Services

Business Analyst Checklist

Source Approvals

SetID: UNCCH Request category: 165

Conf, Rest Fdn Grant, Study Abrd

Source Code: 16828 Request ID: FR000000005 ?

Business Unit: UNCCH Request type: 165B

Conference, Workshops, Seminar

Add a change request

### Source Request

Find | View All First 1 of 2 Last

\*Effective Date: 10/01/2014

Questionnaire

Print Source Authority

☐ Deactivate Source code

### Request Details

Status: Change in Progress

\* Makes a copy  
of the existing  
source request

nc.edu

\*Campus Box: 1234

\*Department ID: 302100

Academic Advising

nc.edu

\*Campus Box: 1234

\*Department ID: 302100

Academic Advising

@unc.edu

\*Campus Box: 1234

\*Description: NCCEOP Confr

\*Descrlong  
(e.g. Purpose):

Fund shall be used to cover all expenses related to the conference, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.

\*Source:

Funding comes from registration fees, or internal and external sponsorships.

\*Justification:

This is for the NCCEOP Upward Bound Academic Symposium & College Fair.

Source Title: NCCEOP Upward Bound Academic Symposium & College Fair

Source Request

Accounting Services

Business Analyst Checklist

Source Approvals

SetID: UNCCH Request category: 165

Conf, Rest Fdn Grant, Stud

Business Unit: UNCCH Request type: 165B

Conference, Workshops, S

\* Opens the fields  
for editing

### Source Request

\*Effective Date: 10/01/2014

Questionnaire

Print Source Authority

☐ Deactivate Source code

### Request Details

Status: Change in Progress

\*Requester ID: 700009990 Lemer, David

\*Phone: 919/555-1234

\*Email ID: dlemer@unc.edu

\*Campus Box: 1234

\*Responsible person: 700009993 Collins, Lara

\*Department ID: 302100 Academic Advising

\*Title: Other

\*Phone: 919/555-1234

\*Email ID: lcollins@unc.edu

\*Campus Box: 1234

\*Disbursing Authority ID: 700009994 Nickleson, Tamara

\*Department ID: 302100 Academic Advising

\*Title: Other

\*Phone: 919/555-1234

\*Email ID: tnickleson@unc.edu

\*Campus Box: 1234

\*Description: NCCEOP Confr

\*Descr long  
(e.g. Purpose):

Fund shall be used to cover all expenses related to the conference, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.

\*Source:

Funding comes from registration fees, or internal and external sponsorships.

\*Justification:

This is for the NCCEOP Upward Bound Academic Symposium & College Fair.

Source Title: NCCEOP Upward Bound Academic Symposium & College Fair

SetID: UNCCH Request category: 165

Conf, Rest Fdn Grant, Study Abrd

Source Code: 16828 Request Id: FR000000005 ?

Business Unit: UNCCH Request type: 165B

Conference, Workshops, Seminar

[Add a change request](#)

## Source Request

[Find](#) | [View All](#)

First 1 of 2 Last

\*Effective Date: 10/01/2014

[Questionnaire](#)[Print Source Authority](#)☐ Deactivate Source code

## Request Details

Status: Change in Progress

\*Requester ID: 700009990 [Lemer, David](#)

\*Phone: 919/555-1234

\*Email ID: [dlemer@unc.edu](#)

\*Campus Box: 1234

\*Responsible person: [Collins, Lara](#)\*Department ID: 302100 [Academic Advising](#)

\*Title: Other

\*Phone: 919/555-1234

\*Email ID: [jcollins@unc.edu](#)

\*Campus Box: 1234

\*Disbursing Authority ID: 700009994 [Nickleson, Tamara](#)\*Department ID: 302100 [Academic Advising](#)

\*Title: Other

\*Phone: 919/555-1234

\*Email ID: [tnickleson@unc.edu](#)

\*Campus Box: 1234

\*Description: NCCEOP Confr

\*Description (e.g. Purpose):

Fund shall be used to cover all expenses related to the conference, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.

\*Source:

Funding comes from registration fees, or internal and external sponsorships.

\*Justification:

This is for the NCCEOP Upward Bound Academic Symposium &amp; College Fair.

Source Title: NCCEOP Upward Bound Academic Symposium &amp; College Fair

SetID: UNCCCH Request category: 165

Conf,Rest Fdn Grant,Study Abrd

Source Code: 16828 Request Id: FR000000005 ?

Business Unit: UNCCCH Request type: 165B

Conference, Workshops, Seminar

[Add a change request](#)

## Source Request

[Find](#) | [View All](#) First 1 of 2 Last

\*Effective Date: 10/01/2014

[Questionnaire](#)[Print Source Authority](#)☐ Deactivate Source code

## Request Details

Status: Change in Progress

\*Requester ID: 700009990 [Lerner, David](#)

\*Phone: 919/555-1234

\*Email ID: [dlemer@unc.edu](#)

\*Campus Box: 1234

\*Responsible person: 700009995 [Collins, Kara](#)\*Department ID: 302100 [Academic Advising](#)

\*Title: Other

\*Phone: 919/555-1234

\*Email ID: [kcollins@unc.edu](#)

\*Campus Box: 1234

\*Disbursing Authority ID: 700009994 [Nickleson, Tamara](#)\*Department ID: 302100 [Academic Advising](#)

\*Title: Other

\*Phone: 919/555-1234

\*Email ID: [tnickleson@unc.edu](#)

\*Campus Box: 1234

\*Description: NCCEOP Confr

\*Descr long  
(e.g.Purpose):

Fund shall be used to cover all expenses related to the conferece, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.

\*Source:

Funding comes from registration fees, or internal and external sponsorships.

\*Justification:

This is for the NCCEOP Upward Bound Academic Symposium &amp; College Fair.

Source Title: NCCEOP Upward Bound Academic Symposium &amp; College Fair

SetID: UNCCH Request category: 165

Conf,Rest Fdn Grant,Study Abrd

Source Code: 16828 Request Id: FR000000005 ?

Business Unit: UNCCH Request type: 165B

Conference, Workshops, Seminar

[Add a change request](#)

## Source Request

[Find](#) | [View All](#) First 1 of 2 Last

\*Effective Date: 10/01/2014

[Questionnaire](#)[Print Source Authority](#)☐ Deactivate Source code

## Request Details

Status: Change in Progress

\*Requester ID: 700009990 [Lemer, David](#)

\*Phone: 919/555-1234

\*Email ID: [dlemer@unc.edu](#)

\*Campus Box: 1234

\*Responsible person: 700009995 [Dobson, Kara](#)\*Department ID: 302100 [Academic Advising](#)

\*Title: Other

\*Phone: 919/555-1234

\*Email ID: [jcollins@unc.edu](#)

\*Campus Box: 1234

\*Disbursing Authority ID: 700009994 [Nickleson, Tamara](#)\*Department ID: 302100 [Academic Advising](#)

\*Title: Other

\*Phone: 919/555-1234

\*Email ID: [tnickleson@unc.edu](#)

\*Campus Box: 1234

\*Description: NCCEOP Confr

\*Descrlong  
(e.g.Purpose):

Fund shall be used to cover all expenses related to the confernece, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.

\*Source:

Funding comes from registration fees, or internal and external sponsorships.

\*Justification:

This is for the NCCEOP Upward Bound Academic Symposium &amp; College Fair.

Source Title: NCCEOP Upward Bound Academic Symposium &amp; College Fair

SetID: UNCCH Request category: 165

Conf, Rest Fdn Grant, Study Abrd

Source Code: 16828 Request Id: FR000000005 ?

Business Unit: UNCCH Request type: 165B

Conference, Workshops, Seminar

[Add a change request](#)

## Source Request

[Find](#) | [View All](#)

First

1 of 2

[Last](#)

\*Effective Date: 10/01/2014

[Questionnaire](#)[Print Source Authority](#)☐ Deactivate Source code

## Request Details

Status: Change in Progress

\*Requester ID: 700012219 [Lerner, David](#)

\*Phone: 919/555-1234

\*Email: [dlemer@unc.edu](mailto:dlemer@unc.edu)

\*Campus Box: 1234

\*Responsible person: 700009995 [Dobson, Kara](#)\*Department ID: 302100 [Academic Advising](#)

\*Title: Director

\*Phone: 919/555-1234

\*Email: [kdobson@unc.edu](mailto:kdobson@unc.edu)

\*Campus Box: 1234

\*Disbursing Authority ID: [Nickleason, Tamara](#)\*Department ID: 302100 [Academic Advising](#)

\*Title: Other

\*Phone: 919/555-1234

\*Email: [tnickleason@unc.edu](mailto:tnickleason@unc.edu)

\*Campus Box: 1234

\*Description: NCCEOP Confr

\*Descr long  
(e.g. Purpose):

Fund shall be used to cover all expenses related to the conference, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.

\*Source:

Funding comes from registration fees, or internal and external sponsorships.

\*Justification:

This is for the NCCEOP Upward Bound Academic Symposium &amp; College Fair.

Source Title: NCCEOP Upward Bound Academic Symposium &amp; College Fair

[Source Request](#)[Accounting Services](#)[Business Analyst Checklist](#)[Source Approvals](#)

SetID: UNCCH Request category: 165

Conf, Rest Fdn Grant, Study Abrd

Source Code: 16828 Request Id: FR000000005 ?

Business Unit: UNCCH Request type: 165B

Conference, Workshops, Seminar

[Add a change request](#)

## Source Request

[Find](#) | [View All](#) First 1 of 2 Last

\*Effective Date:

10/01/2014

[Questionnaire](#)[Print Source Authority](#)☐ Deactivate Source code

## Request Details

Status: Change in Progress

\*Requester ID:

700009990

[Lerner, David](#)

\*Phone:

919/555-1234

\*Email ID:

dlerner@unc.edu

\*Campus Box:

1234

\*Responsible person:

700009995

[Dobson, Kara](#)

\*Department ID:

302100

[Academic Advising](#)

\*Title:

Director

\*Phone:

919/555-1234

\*Email ID:

kdobson@unc.edu

\*Campus Box:

1234

\*Disbursing Authority ID:

700009996

[Johnston, Carl](#)

\*Department ID:

302100

[Academic Advising](#)

\*Title:

Treasury

\*Phone:

919/555-1234

\*Email ID:

@unc.edu

\*Campus Box:

1234



SetID: UNCCH Request category: 165 Conf,Rest Fdn Grant,Study Abrd Source Code: 16828 Request Id: FR000000005?  
Business Unit: UNCCH Request type: 165B Conference, Workshops, Seminar Add a change request

## Source Request

Find | View All

First 1 of 2 Last

\*Effective Date: 10/01/2014

Questionnaire

Print Source Authority

☐ Deactivate Source code

## Request Details

Status: Change in Progress

\*Requester ID: 700009990 Lerner, David

\*Phone: 919/555-1234

\*Email ID: dlerner@unc.edu

\*Campus Box: 1234

\*Responsible person: 700009995 Dobson, Kara

\*Department ID: 302100 Academic Advising

\*Title: Director

\*Phone: 919/555-1234

\*Email ID: kdobson@unc.edu

\*Campus Box: 1234

\*Disbursing Authority ID: 700009996 Johnston, Carl

\*Department ID: 302100 Academic Advising

\*Title: Treasury

\*Phone: 919/555-1234

\*Email ID: cjohnst@unc.edu

\*Campus Box: 1234

\*Description: NCEOP Confr

\*Descrlong  
(e.g.Purpose):

Fund shall be used to cover all expenses related to the conferece, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.

\*Source:

Funding comes from registration fees, or internal and external sponsorships.

\*Justification:

This is for the NCEOP Upward Bound Academic Symposium &amp; College Fair.

Source Title: NCEOP Upward Bound Academic Symposium &amp; College Fair

SetID: UNCCH Request category: 165 Conf,Rest Fdn Grant,Study Abrd Source Code: 16828 Request Id: FR000000005?  
Business Unit: UNCCH Request type: 165B Conference, Workshops, Seminar Add a change request

## Source Request

Find | View All

First 1 of 2 Last

\*Effective Date: 10/01/2014

Questionnaire

Print Source Authority

☐ Deactivate Source code

## Request Details

Status: Change in Progress

\*Requester ID: 700009990 Lerner, David

\*Phone: 919/555-1234

\*Email ID: dlerner@unc.edu

\*Campus Box: 1234

\*Responsible person: 700009995 Dobson, Kara

\*Department ID: 302100 Academic Advising

\*Title: Director

\*Phone: 919/555-1234

\*Email ID: kdobson@unc.edu

\*Campus Box: 1234

\*Disbursing Authority ID: 700009996 Johnston, Carl

\*Department ID: 302100 Academic Advising

\*Title: Treasury

\*Phone: 919/555-1234

\*Email ID: cjohnst@unc.edu

\*Campus Box: 1234

\*Description: NCCEOP Confr

\*Descrlong  
(e.g.Purpose):

Fund shall be used to cover all expenses related to the conferece, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.

\*Source:

Funding comes from registration fees, or internal and external sponsorships.

\*Justification:

This is for the NCCEOP Upward Bound Academic Symposium &amp; College Fair.

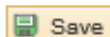
Source Title: NCCEOP Upward Bound Academic Symposium &amp; College Fair

Source Request

Source Approvals

SetID: UNCCH Request category: 165 Conf,Rest Fdn Grant,Study Abrd Source Code: Request Id: FR000000005 ?  
Business Unit: UNCCH Request type: 165B Conference, Workshops, Seminar

Submit



Save



Notify



Add



Update/Display



Include History

Source Request

Source Approvals

Saved

SetID: UNCC Request category: 165

Conf,Rest Fdn Grant,Study Abrd

Source Code:

Request Id: FR000000005 ?

Business Unit: UNCC Request type: 165B

Conference, Workshops, Seminar

### Department Approval

▼ SETID=UNCC, BUSINESS\_UNIT=UNCC, NC\_RQST\_TYPE=165B, NC\_RQST\_CAT=165, NC\_RQST\_ID=FR000000003:Pending

#### Department Approval

##### Skipped



Ellen Smith  
FUND SOURCE DEPT APPROVAL  
09/30/14 - 10:20 AM

##### Pending



Multiple Approvers  
FUND SOURCE DEPT APPROVAL

#### ▶ Comments

### Accounting Services

▼ SETID=UNCC, BUSINESS\_UNIT=UNCC, NC\_RQST\_TYPE=165B, NC\_RQST\_CAT=165, NC\_RQST\_ID=FR000000003:Awaiting Further Approval

#### Accounting Services

##### Not Routed



Multiple Approvers  
FUND SOURCE ACCTG SERVICES

#### ▶ Comments

### Business Analyst

▼ SETID=UNCC, BUSINESS\_UNIT=UNCC, NC\_RQST\_TYPE=165B, NC\_RQST\_CAT=165, NC\_RQST\_ID=FR000000003:Awaiting Further Approval

#### Business Analyst

##### Not Routed



Multiple Approvers  
FUND SOURCE BA



#### ▶ Comments

Save

Notify

\* Email sent to requester, responsible person, and disbursing authority

Subject: [WARNING: MESSAGE ENCRYPTED]Add/Change Source request FR00000

 Message  NC\_SOURCE\_AUTHORITYFR000000005.pdf (9 KB)

Source and Fund Authority has been created and ready to be printed.

Source Details Unit:UNCCH

Request Id:FR000000003

Fund Source:

Category:Capital Improvements

Type:Capital Improvements

A Source and Fund Authority has been created and is ready to be printed.

[https://ccpaspt.unc.edu/psp/pa91spt/EMPLOYEE/ERP/c/NC\\_CUSTOM.NC\\_FUND\\_AUTH\\_RQST.GBL?Action=U](https://ccpaspt.unc.edu/psp/pa91spt/EMPLOYEE/ERP/c/NC_CUSTOM.NC_FUND_AUTH_RQST.GBL?Action=U)

Please do not reply to this system generated email. If you have questions on how to proceed, please call the department responsible for this process: 213420 - Accounting Services

### Step one

- Searched for an existing source

### Step two

- Updated the source

### Step three

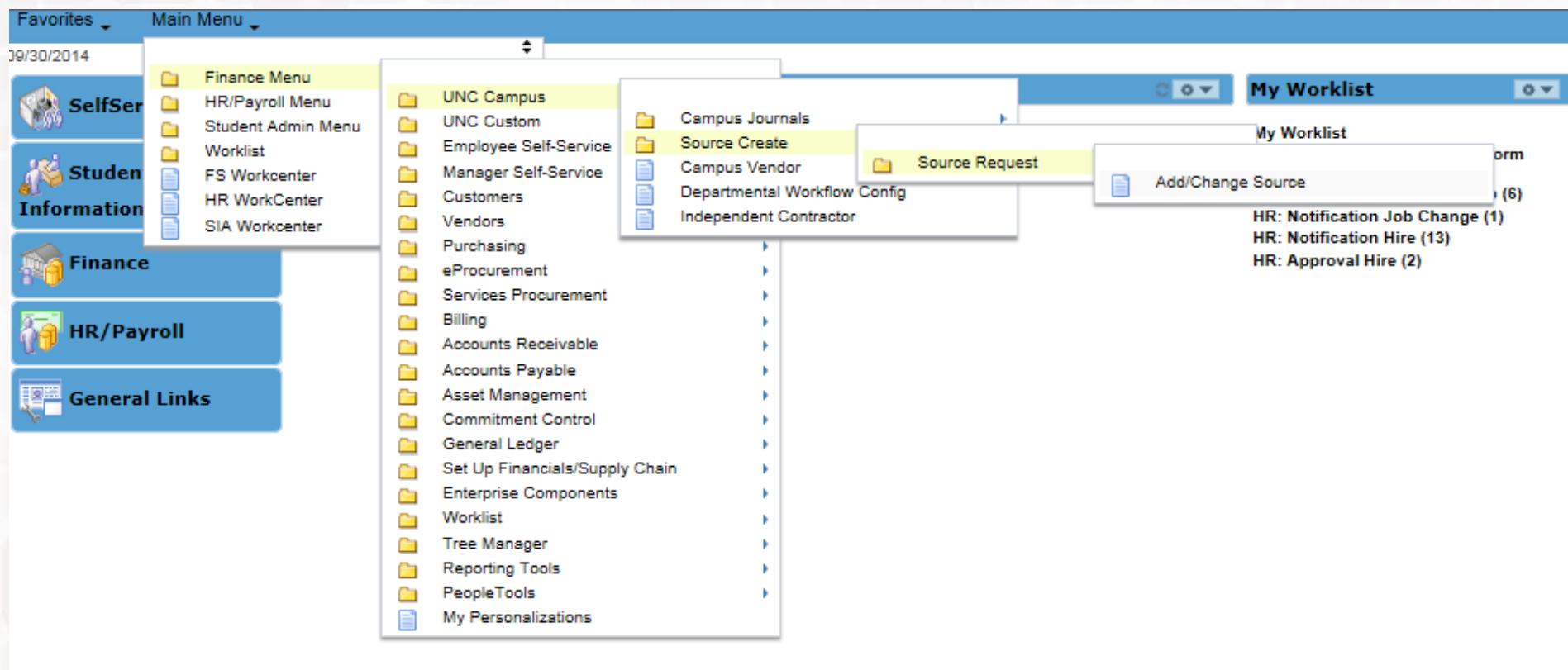
- Submitted the source request for approval

### Step four

- Reviewed an email confirming that the updated source request is available

**Delete a  
source  
request**

Main Menu > Finance Menu > UNC Campus > Source Create > Source Request > Add/Change Source





## Source Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

### ▼ Search Criteria

SetID: begins with ▼ UNCCCH 

Business Unit: begins with ▼ 

Request category: begins with ▼ 165 

Request type: begins with ▼ 165B 

Request Id: begins with ▼ 

Source: begins with ▼ 

Status: begins with ▼ 

Requester Id: begins with ▼ 

☐ Include History ☐ Case Sensitive

Search

Clear

Basic Search



Save Search Criteria

## Source Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

### ▼ Search Criteria

SetID:	begins with ▼	UNCCH	🔍
Business Unit:	begins with ▼		🔍
Request category:	begins with ▼	165	🔍
Request type:	begins with ▼	165B	🔍
Request Id:	begins with ▼		🔍
Source:	begins with ▼		🔍
Status:	begins with ▼		🔍
Requester Id:	begins with ▼		🔍

☐ Include History ☐ Case Sensitive

Search

Clear

Basic Search

📄 Save Search Criteria

## Search Results

View All

First 1-6 of 6 Last

SetID	Business Unit	Request category	Request type	Request Id	Source	Status	Requester Id
UNCCH	UNCCH	165	165B	FR000000006	(blank)	In Progress	700013564
UNCCH	UNCCH	165	165B	FR000000005	(blank)	Request Submitted	700012219
UNCCH	UNCCH	165	165B	FR000000004	(blank)	In Progress	700013128
UNCCH	UNCCH	165	165B	FR000000003	(blank)	Request Submitted	700013564
UNCCH	UNCCH	165	165B	FR000000002	(blank)	Request Submitted	700013564
UNCCH	UNCCH	165	165B	FR000000001	(blank)	Request Submitted	700013564

\* Must have the status of In Progress

[Source Request](#)[Source Approvals](#)

SetID: UNCC Request category: 165

Conf, Rest Fdn Grant, Study Abrd

Source Code:

Business Unit: UNCC Request type:

165B



Conference, Workshops, Seminar

\* Scroll down

## Source Request

[Find](#)

\*Effective Date: 09/30/2014

[Questionnaire](#)[Print Source Authority](#)

## Request Details

Status: In Progress

\*Requester ID: 700009990



Lerner, David

Phone: 919/555-1234

Email ID: dlemer@unc.edu

\*Campus Box: 1234

\*Responsible person: 700009991



Quimby, Paul

\*Department ID: 200300



Innovation and Entrepreneurship

\*Title: Director



Phone: 919/555-1234

Email ID: pquimby@unc.edu

\*Campus Box: 1234

\*Disbursing Authority ID: 700009992



Mendolson, Andrea

\*Department ID: 200300



Innovation and Entrepreneurship

\*Title: Dean



Phone: 919/555-1234

Email ID: amendel@unc.edu

\*Campus Box: 1234

\*Description: Ecom Confr

\*Descr long  
(e.g. Purpose):

Fund shall be used to cover all expenses related to the conference, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.



\*Source:

Funding comes from registration fees, or internal and external sponsorships.



\*Justification:

Regional conference to build ecommerce in the Research Triangle.



Source Title: Ecommerce Conference



## Associated Documents

Personalize   Find			
First 1 of 1 Last			
Attached File	View	Delete	

## Source Request

Find | View All First 1 of 1 Last

\*Effective Date: 09/30/2014

Questionnaire

Print Source Authority

## Request Details

Status: In Progress

\*Requester ID: 700009990 Lemer, David

Phone: 919/555-1234

Email ID: dlemer@unc.edu

\*Campus Box: 1234

\*Responsible person: 700009991 Quimby, Paul

\*Department ID: 200300 Innovation and Entrepreneurship

\*Title: Director

Phone: 919/555-1234

Email ID: pquimby@unc.edu

\*Campus Box: 1234

\*Disbursing Authority ID: 700009992 Mendolson, Andrea

\*Department ID: 200300 Innovation and Entrepreneurship

\*Title: Dean

Phone: 919/555-1234

Email ID: amendel@unc.edu

\*Campus Box: 1234

\*Description: Ecom Confr

\*Descrlong (e.g.Purpose): Fund shall be used to cover all expenses related to the conference, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.

\*Source: Funding comes from registration fees, or internal and external sponsorships.

\*Justification: Regional conference to build ecommerce in the Research Triangle.

Source Title: Ecommerce Conference

## Associated Documents

Personalize   Find   First 1 of 1 Last			
Attached File	View	Delete	
1 ecom_fall_14_source_attributes_ds_(2).pdf	View	Delete	+ -

Delete Request

## Message

Are you sure you want to delete this request? (30015,5)

Click 'Yes' to delete the request or click 'No' to cancel the deletion.

Yes

No

- removes a new source request from the system
- Removes the update request for an existing source and the system maintains the history

### Step one

- Searched for an existing source

### Step two

- Clicked the Delete Button

### Step three

- Source request is removed from the system

**Deactivate  
a source**

Main Menu > Finance Menu > UNC Campus > Source Create > Source Request > Add/Change Source

The screenshot displays a web application interface with a navigation menu. The menu is structured as follows:

- Navigation Bar:** Includes "Favorites", "Main Menu", and a date "09/30/2014".
- Left Sidebar:** Contains icons and labels for "SelfSer", "Student Information", "Finance", "HR/Payroll", and "General Links".
- Main Menu:** A dropdown menu with the following items:
  - Finance Menu
  - HR/Payroll Menu
  - Student Admin Menu
  - Worklist
  - FS Workcenter
  - HR WorkCenter
  - SIA Workcenter
- UNC Campus:** A sub-menu item under "Finance Menu" with the following items:
  - UNC Custom
  - Employee Self-Service
  - Manager Self-Service
  - Customers
  - Vendors
  - Purchasing
  - eProcurement
  - Services Procurement
  - Billing
  - Accounts Receivable
  - Accounts Payable
  - Asset Management
  - Commitment Control
  - General Ledger
  - Set Up Financials/Supply Chain
  - Enterprise Components
  - Worklist
  - Tree Manager
  - Reporting Tools
  - PeopleTools
  - My Personalizations
- Source Create:** A sub-menu item under "UNC Campus" with the following items:
  - Campus Journals
  - Source Create
  - Campus Vendor
  - Departmental Workflow Config
  - Independent Contractor
- Source Request:** A sub-menu item under "Source Create" with the following items:
  - Add/Change Source
- My Worklist:** A section on the right side of the page showing a list of items:
  - HR: Notification Job Change (1)
  - HR: Notification Hire (13)
  - HR: Approval Hire (2)



## Source Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

### ▼ Search Criteria

SetID: begins with ▼ UNCCCH 

Business Unit: begins with ▼ 

Request category: begins with ▼ 165 

Request type: begins with ▼ 165B 

Request Id: begins with ▼ 

Source: begins with ▼ 

Status: begins with ▼ 

Requester Id: begins with ▼ 

☐ Include History ☐ Case Sensitive

Search

Clear

Basic Search



Save Search Criteria

## Source Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

### Search Criteria

SetID:	begins with ▼	UNCCH	
Business Unit:	begins with ▼		
Request category:	begins with ▼	165	
Request type:	begins with ▼		
Request Id:	begins with ▼		
Source:	begins with ▼		
Status:	begins with ▼		
Requester Id:	begins with ▼		

☐ Include History ☐ Case Sensitive

Search

Clear

Basic Search Save Search Criteria

## Search Results

View All

First 1-6 of 6 Last

SetID	Business Unit	Request category	Request type	Request Id	Source	Status	Requester Id
UNCCH	UNCCH	165	165B	FR000000007	(blank)	In Progress	700012219
UNCCH	UNCCH	165	165B	FR000000005	16828	Change in Progress	700012219
UNCCH	UNCCH	165	165B	FR000000004	(blank)	Request Submitted	700013128
UNCCH	UNCCH	165	165B	FR000000003	(blank)	Department Approved	700013564
UNCCH	UNCCH	165	165B	FR000000002	16829	University Controller Approved	700013564
UNCCH	UNCCH	165	165B	FR000000001	16830	Accounting services approved	700013564

\* Must have the status of University Controller Approved

SetID: UNCCH Request category: 165 Conf,Rest Fdn Grant,Study Abrd  
Business Unit: UNCCH Request type: 165B Conference, Workshops, Seminar

Source Code: 16829 Request ID: FR000000002?

[Add a change request](#)

## Source Request

Find | View All First 1 of 2 Last

\*Effective Date: 10/01/2014

[Questionnaire](#)

[Print Source Authority](#)

☐ Deactivate Source code

## Request Details

Status: University Controller Approved

Requester ID: 700009990 Paulson, Jeremy

Phone: 919/555-1234 Email ID: jpaulson@unc.edu Campus Box: 1234

Responsible person: 700009991 Cosover, Emily Department ID: 318200 Biology

Title: Other

Phone: 919/555-1234 Email ID: ecosover@unc.edu Campus Box: 1234

Disbursing Authority ID: 700009992 Wilmer, Kurt Department ID: 318200 Biology

Title: Other

Phone: 919/555-1234 Email ID: kwilmer@unc.edu Campus Box: 1234

Description: Bio Confr

Descr long (e.g.Purpose): Fund shall be used to cover all expenses related to the conferece, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.

Source: Funding comes from registration fees, or internal and external sponsorships.

Justification: This is for the semi-annual Biology Conference

Source Title: Biology Conference

## Associated Documents

Personalize | Find | First 1 of 1 Last

Attached File

[View](#)

1 biology\_conference\_source\_attributes\_ds

[View](#)

[Source Request](#)[Source Approvals](#)

SetID: UNCCH Request category: 165

Conf,Rest Fdn Grant,Study Abrd

Source Code: 16829 Request Id: FR000000002 ?

Business Unit: UNCCH Request type: 165B

Conference, Workshops, Seminar

[Add a change request](#)

## Source Request

[Find](#) | [View All](#) First 1 of 2 Last

\*Effective Date: 10/01/2014

[Questionnaire](#)[Print Source Authority](#)☐ Deactivate Source code

## Request Details

Status: Change in Progress

\*Requester ID: 700009990 Lerner, David

\*Phone: 919/555-1234

\*Email ID: dlerner@unc.edu

\*Campus Box: 1234

\*Responsible person: 700009991 Quimby, Paul

\*Department ID: 200300 Innovation and Entrepreneurshp

\*Title: Other

\*Phone: 919/555-1234

\*Email ID: pquimby@unc.edu

\*Campus Box: 1234

\*Disbursing Authority ID: 700009992 Mendolson, Andrea

\*Department ID: 200300 Innovation and Entrepreneurshp

\*Title: Other

\*Phone: 919/555-1234

\*Email ID: amendel@unc.edu

\*Campus Box: 1234

\*Description: Bio Confr

\*Descrlong  
(e.g.Purpose):

Fund shall be used to cover all expenses related to the confernece, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.

\*Source:

Funding comes from registration fees, or internal and external sponsorships.

\*Justification:

This is for the semi-annual Biology Conference

Source Title: Ecommerce Conference Fall 2014

SetID: UNCCH Request category: 165

Conf, Rest Fdn Grant, Study Abrd

Source Code: 16829 Request ID: FR000000002 ?

Business Unit: UNCCH Request type: 165B

Conference, Workshops, Seminar

[Add a change request](#)

## Source Request

[Find](#) | [View All](#)

First 1 of 2 Last

Effective Date: 10/01/2014

[Questionnaire](#)[Print Source Authority](#)☒ [Deactivate Source code](#)

## Request Details

Status: Change in Progress

Requester ID: 700009990 Paulson, Jeremy

Phone: 919/555-1234

Email ID: jpaulson@unc.edu

Campus Box: 1234

Responsible person: 700009991 Cosover, Emily

Department ID: 318200 Biology

Title: Other

Phone: 919/555-1234

Email ID: ecosover@unc.edu

Campus Box: 1234

Disbursing Authority ID: 700009992 Wilmer, Kurt

Department ID: 318200 Biology

Title: Other

Phone: 919/555-1234

Email ID: kwilmer@unc.edu

Campus Box: 1234

Description: Bio Confr

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Source:

Funding comes from registration fees, or internal and external sponsorships.

\*Justification:

This is for the semi-annual Biology Conference

Source Title: Ecommerce Conference Fall 2014

## Associated Documents

[Personalize](#) | [Find](#)

First 1 of 1 Last

Attached File

[Attach](#)

1 biology\_conference\_source\_attributes\_ds

[Attach](#)

## Questionnaire

Questionnaire		Find   View All	First	1 of 1	Last
Effective Date: 10/01/2014					
Question					
<input checked="" type="checkbox"/>	I have read the <a href="#">Questions to Consider before Deactivating a Source</a> document and agree this source is ready to be deactivated				



OK Cancel

\* Click the link to view the Questions to consider before Deactivating a Source

## Questionnaire

Questionnaire

[Find](#) | [View All](#)

First  1 of 1  Last

Effective Date: 10/01/2014

Question

- ☒ I have read the [Questions to Consider before Deactivating a Source](#) document and agree this source is ready to be deactivated

OK

Cancel

SetID: UNCCCH Request category: 165

Conf, Rest Fdn Grant, Study Abrd

Source Code: 16829 Request ID: FR000000002 ?

Business Unit: UNCCCH Request type: 165B

Conference, Workshops, Seminar

[Add a change request](#)

## Source Request

Find | View All First 1 of 2 Last

Effective Date: 10/01/2014

[Questionnaire](#)[Print Source Authority](#)☒ Deactivate Source code

## Request Details

Status: Change in Progress

Requester ID: 700009990 Paulson, Jeremy

Phone: 919/555-1234 Email ID: jpaulson@unc.edu Campus Box: 1234

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Title: Other

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Title: Other

Phone: 919/555-1234 Email ID: kwilmer@unc.edu Campus Box: 1234

Description: Bio Confr

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Source: Funding comes from registration fees, or internal and external sponsorships.

\*Justification:

Source Title: Ecommerce Conference Fall 2014

## Associated Documents

Personalize | Find | First 1 of 1 Last

Attached File

Attach

1

[Attach](#)



SetID: UNCCCH Request category: 165 Conf,Rest Fdn Grant,Study Abrd Source Code: 16829 Request Id: FR000000002 ?  
Business Unit: UNCCCH Request type: 165B Conference, Workshops, Seminar Add a change request

## Source Request

Find | View All First 1 of 2 Last

Effective Date: 10/01/2014

[Questionnaire](#)[Print Source Authority](#)☒ Deactivate Source code

## Request Details

Status: Change in Progress

Requester ID: 700009990 Paulson, Jeremy

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Responsible person: 700009991 Cosover, Emily Department ID: 318200 Biology

Title: Other  
Phone: 919/555-1234 Email ID: ecosover@unc.edu Campus Box: 1234

Disbursing Authority ID: 700009992 Wilmer, Kurt Department ID: 318200 Biology

Title: Other  
Phone: 919/555-1234 Email ID: kwilmer@unc.edu Campus Box: 1234

Description: Bio Confr

Descrlong  
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Source: Funding comes from registration fees, or internal and external sponsorships.

\*Justification:

Source Title: Ecommerce Conference Fall 2014

## Associated Documents

Personalize | Find | First 1 of 1 Last

Attached File

1

Attach

[Attach](#)

[Source Request](#)[Source Approvals](#)

SetID: UNCCH Request category: 165 Conf, Rest Fdn Grant, Study Abrd Source Code: 16829 Request Id: FR000000002 ?  
Business Unit: UNCCH Request type: 165B Conference, Workshops, Seminar Add a change request

Source Request

Find | View All First 1 of 2 Last

Effective Date: 10/01/2014

[Questionnaire](#)[Print Source Authority](#)☒ Deactivate Source code

## Request Details

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Requester ID: 700009990 Paulson, Jeremy

Phone: 919/555-1234 Email ID: jpaulson@unc.edu

Campus Box: 1234

Responsible person: 700009991 Cosover, Emily

Department ID: 318200 Biology

Title: Other

Phone: 919/555-1234 Email ID: ecosover@unc.edu

Campus Box: 1234

Disbursing Authority ID: 700009992 Wilmer, Kurt

Department ID: 318200 Biology

Title: Other

Phone: 919/555-1234 Email ID: kwilmer@unc.edu

Campus Box: 1234

Description: Bio Confr

Desclong (e.g.Purpose): Fund shall be used to cover all expenses related to the confernece, workshop, or seminar, including food and beverages, rooms, amenities for event. Fund not used for a specific event.

Source: Funding comes from registration fees, or internal and external sponsorships.

\*Justification: Duplicate source

Source Title: Ecommerce Conference Fall 2014

## Associated Documents

Personalize | Find | First 1 of 1 Last

Attached File

View

Delete

1 Justification\_to\_remove\_source.docx

[View](#)[Delete](#)

Source Request

Source Approvals

SetID: UNCH Request category: 165

Conf,Rest Fdn Grant,Study Abrd

Source Code:

Request Id: FR000000002 ?

Business Unit: UNCH Request type: 165B

Conference, Workshops, Seminar

Submit

Source Request

Source Approvals

Saved

SetID: UNCC Request category: 165

Conf,Rest Fdn Grant,Study Abrd

Source Code:

Request Id: FR000000005 ?

Business Unit: UNCC Request type: 165B

Conference, Workshops, Seminar

### Department Approval

SETID=UNCC, BUSINESS\_UNIT=UNCC, NC\_RQST\_TYPE=165B, NC\_RQST\_CAT=165, NC\_RQST\_ID=FR000000003:Pending

#### Department Approval

##### Skipped



Ellen Smith  
FUND SOURCE DEPT APPROVAL  
09/30/14 - 10:20 AM

##### Pending



Multiple Approvers  
FUND SOURCE DEPT APPROVAL

#### Comments

### Accounting Services

SETID=UNCC, BUSINESS\_UNIT=UNCC, NC\_RQST\_TYPE=165B, NC\_RQST\_CAT=165, NC\_RQST\_ID=FR000000003:Awaiting Further Approval

#### Accounting Services

##### Not Routed



Multiple Approvers  
FUND SOURCE ACCTG SERVICES

#### Comments

### Business Analyst

SETID=UNCC, BUSINESS\_UNIT=UNCC, NC\_RQST\_TYPE=165B, NC\_RQST\_CAT=165, NC\_RQST\_ID=FR000000003:Awaiting Further Approval

#### Business Analyst

##### Not Routed



Multiple Approvers  
FUND SOURCE BA

#### Comments

Save

Notify

### Step one

- Searched for an existing source

### Step two

- Marked it to be Deactivated

### Step three

- Submitted the deactivation request for approval

### Key Points to Remember

- Use ConnectCarolina to enter source requests
- The Business Analysis Group creates the new source chartfields in the system
- You will receive two email notifications:
  - One from the Business Analysis Group that a source chartfield is available for use
  - A second from the controller with the Fund and Source Authority Document attached



# Thank you for your participation!

## For more information

- Review the [Q&A from Webinar](#) to review any questions from the webinar
- Use the [ConnectCarolina Online Help](#) for step-by-step instruction on entering a source request
- Take the [Requesting New Chartfields CBT](#)
- Go to the Finance Division Website to view:
  - [Source Create Information](#)
  - [Questions to answer before deactivating a source](#)