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To:

Subject: Feb. 4 -- ConnectCarolina Finance Update
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ConnectCarolina

Finance Division Update

Feb. 4, 2015

This Finance Division Update email is for Business Managers, MOU Leads, Finance TIPs, Finance Campus Working Groups and Finance Division staff. Please share with the ConnectCarolina Finance users in your school/division. [We will send updates weekly and as needed.](#)

Top Issues

NEW! Campus Vendor: The following are changes made to Campus Vendor:

1. The system will not allow you to create a New Request if there is a Request already created and submitted for the same TIN/PID and SETID (UNCCH or UNCGA).
2. The system will not allow you to create a New Request if the vendor already exists in ConnectCarolina. You can create a change request to the Address, Contact or Payment information if needed.
3. The system will not allow you to Submit an existing Request if a previous Request for the same TIN/PID and SETID (UNCCH or UNCGA) has been approved and a vendor has been created.
4. If a Request needs to be deleted, users can now communicate this change to the vendor coordinator and the coordinator can delete the Request. Be sure to give the coordinator the SETID and REQUEST ID found on the page.

NEW! P-card and CABS Journal Entry Recon Values: The following fields are now populated on the P-card and CABS journal entries. These new fields apply to transactions dated Feb. 1, 2015, and later. P-card and CABS transactions prior to that are already posted, and cannot be changed. These values will display on the InfoPorte Transaction tab:

- P-card: Merchant name is in the Description column, and the purchased date is in the Reference 1 column.
- CABS: Traveler's name is in the Description column, and the CAB# is in Reference 1 column.

NEW! Web Travel and P-card: As of Jan. 30, two modifications have updated the user interface for Web Travel and P-card:

1. A type-ahead function is now available on all chartfield values except the GL Business Unit. This feature will ensure that only valid chartfield values are entered in each chartfield by avoiding any typos that result in invalid values. The system will continue to process the combo edit after all values are entered in order to ensure that the full chartfield string is valid and to return error messages in that event.
2. Users were experiencing an error that caused Maupin Travel's agency name to appear on a printed Web Travel document regardless of the actual travel agency used. This error has been fixed.

NEW! Requesting a Retroactive Journal Entry: The [Request Form for Retroactive Journal Entries](#) has been updated with: new examples, revised instructions and space for an electronic signature. Remember to delete any older version of the form you may be using.

NEW! ePro Vendor Catalog: Users should enter any special delivery instructions or requested due dates in the Header Comments and click the Send to Vendor box. Entering comments is the only way vendors will receive this important information.

Encumbrances: Look for a stand-alone communication about this topic coming soon.

December Month-End Close: Central Offices (OSR, Accounting Services and the Budget Office) continue to work on December month-end close.

Important Reminders

User Groups Meeting: The first user group meeting is a joint HR/Payroll and Finance kickoff meeting to be held on Feb. 6 from 11 am to 12 noon, in the Genome Sciences Bldg., Room G100. More information about User Groups can be found on ccinfo.unc.edu.

Submitting tickets: Users are encouraged to call the Help Desk when they are unsure who to contact for issue resolution. While users may have worked with a specific consultant or BA for another issue, any new issues must be submitted via a remedy ticket, not by calling an individual directly. This is the fastest way to obtain assistance and allows the project team to be able to track issues to determine the scale of the impact to all users.

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).

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.