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To:

Cc:

Subject: Nov. 25 -- ConnectCarolina Finance Update
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ConnectCarolina

Finance Division Daily Update

Nov. 25, 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

ARP: The ARP data entry period has begun! Revised ARP data entry instructions were sent to campus groups including MOU Leads on Saturday, Nov. 22. *Please make sure you use the new instructions.*

We strongly encourage schools/departments to enter their ARP actions as soon as possible. We are consistently hearing reports that the data entry process is very time-consuming. Please do not wait until the last minute to enter your actions.

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. HR Officers are being encouraged to discuss this issue with their finance representative and consider the following workaround, which may save 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.
- 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.

Following are some tips from today's 11:30 a.m. ARP call:

- If you need to enter a ticket for an ARP issue, be sure to note that the ticket is for an ARP action. ARP-related tickets are being regularly reviewed.
- To enter a cost share chartfield string: Enter the four required chartfields for the source of funds that is being *charged* (Fund, Source, Account, Department). On the same line, enter the three project costing chartfields (Business Unit PC, Project ID, Activity ID). Use the project ID that you need to *provide cost share for*.
- Make sure you validate your data entry and check for errors and typos before you submit. Remember that workflow has been removed on ARP actions, so as soon as the action is entered, it will write to the system. Therefore, any changes after the action is entered will be difficult and time-consuming to address. However, it would still be wise to validate your data entry after submitting the action; you may find it helpful to note the ePAR number of each action so that they can be verified after submission. 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.

TIM Update: Earlier today, a notice was sent today to TIM Administrators regarding holidays in TIM. The Required Holidays Worked Process has changed. Please review the new process.

Important Reminders

University Deposits: The following are some upcoming deadlines:

- The deadline for delivering November dated cash/check deposits to the University Cashier in SASB North is 10 a.m. Monday, 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.

ARP Assistance: We are holding optional daily calls at 11:30 a.m. beginning today 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:

- Tuesday, Nov. 25: 1:30-3 p.m., ITS Manning Room 2400
- 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

Airgas Holiday Schedule: Airgas National Welders will be closed Thursday, Nov. 27 – Friday, Nov. 28 in observance of the Thanksgiving holiday. During this time no scheduled deliveries will be made. Dry ice will be delivered on Monday, Nov. 24 and Wednesday, Nov. 26.

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.