MEMORANDUM

To: Business Managers, HR Officers

From: Matt Brody, Associate Vice Chancellor for Human Resources
                Fran Dykstra, Assistant Vice Chancellor for Enterprise Applications
                Scott Jackson, Executive Director of Enterprise Reporting and Dept Systems
                Andy Johns, Associate Vice Chancellor for Research
                Brian Smith, Interim Assistant Vice Chancellor for Financial and Accounting Ops

Date: January 7, 2015

RE: ConnectCarolina Update

As business managers and HR officers at the University, you have been working with ConnectCarolina for Finance and HR/Payroll since go-live on Oct. 1, 2014. In addition to implementing new financial, human resources, payroll and reporting applications, the University made several other major changes, including:

- Adopting a more complex chartfield structure (the underlying framework for University accounting) and budgetary structures
- Initiating new business processes in Finance, Human Resources and Sponsored Research
- Utilizing InfoPorte as an enterprise reporting tool across the University

The scale and complexity of this enterprise system implementation were substantial and entailed significant institutional change.

You and your colleagues may be experiencing some challenges as you adjust to these changes. Many of you used the former legacy applications for decades and it may be taking longer than you'd like to feel as productive using ConnectCarolina and InfoPorte (reporting) as you were with the old systems. Those who rely on you – faculty, researchers, department chairs, directors and deans – may also be challenged in acclimating to the new system and all it entails.

The project team – including the Finance Division, Office of Human Resources, Office of Sponsored Research and ITS -- are aware of these challenges and we are working diligently to address them. We continue to offer support via the Business Systems Help Desk. We encourage you to phone the Help Desk or submit an Online Help Request if you are experiencing difficulties. During 2015, we plan to provide additional assistance and enhanced training focused on specific business process support and reporting needs.

Challenges and Solutions
Most users of the new systems are beginning to master basic transactions, but challenges remain. We have heard about significant issues in the following areas and are working to address them:

Issue	Solution and Timeline
Labor encumbrances	A bug has been identified on ePAR forms that results in

	encumbrances not being properly reversed when they should be. We are working on a solution and expect labor encumbrances to be accurate in January.
Payments sent to suspense	Payments to hourly student and temporary workers are frequently being sent to suspense accounts, causing significant rework. Based on discussions with Campus and Central Administrative Offices, we will cease encumbering funds on these two types of employees around the end of January to address part of the issue. After this is done, departments may increase the FTE to avoid payments going to suspense. Changes planned for this spring will also reduce the number of payments charged to suspense when a multi-year award's budget year ends.
Funding grid and ePAR forms	Funding grid functionality on ePAR forms presents a number of difculties for users. In first quarter of 2015, we plan to assess options to improve this functionality.
Viewing paycheck data	Paycheck data is restricted in ConnectCarolina due to the sensitive nature of some of the information it contains. Payroll Services and the Office of Legal Counsel are formulating a solution that will allow a limited number of HR Representatives to see paycheck data; it is anticipated this will be available early in 2015.
HR workflow	Several intermittent issues have arisen with ePAR workflow. HR business analysts are monitoring HR actions and moving the actions through workflow as needed. HR Representatives should also proactively monitor their actions. HR and ITS staff are working to rectify various issues; it is anticipated that a fix will be in place early in 2015.
Delayed payment turnaround time	Finance is evaluating how best to utilize ConnectCarolina capabilities to streamline processing. Additionally, more staff has been added to improve turnaround time.
Converted FRS purchase orders or change orders to those purchase orders not available to campus to receive against	Central Offices have added a listserv to expedite campus requests for receiving against converted purchase orders. These purchase orders will be closed out June 30, 2015. Continuing orders will be created via requisition so that campus has access to the system's full functionality.
Inability to create travel requests	19 bug fixes and customer enhancements have been added to the travel system since go-live. We believe that travel documents are currently processing normally.
Procurement Business Processes	Over time, processes will be reviewed to optimize balance among current business needs, regulatory needs, and system capabilities.

Sponsored Projects end dates and the closeout process	Unlike the old FRS system, ConnectCarolina prevents spending on grants past their end dates. While this is appropriate for the final year of a sponsored project, it is causing significant rework for multi-year continuing projects. We have contacted peer institutions to identify a workable strategy for the University and will be pursuing a design to improve this process. We hope to be able to implement a short term solution while a permanent fix is being implemented.
Sponsor billing for incurred expenses	OSR has successfully drawn funds from several sponsors, including NIH, and is making progress on sending out additional invoices. The transition from a very flexible manual system to an automated system of collecting and summarizing costs for invoicing is taking time. Billing is approximately a month behind and OSR is prioritizing the most urgent needs.
Reporting concerns	The University has adopted InfoPorte as its preferred reporting tool. New data, new data formats, and a significantly more complex chartfield structure and associated budgetary structures complicate the building of standard reports. In addition, InfoPorte was familiar to many schools and departments, but is new to others. The combination of a still-evolving reporting environment and a lack of familiarity with InfoPorte has caused some frustration in our community. Approximately every two weeks, the project team is issuing major releases of new reports and fixes that address specific user needs. These releases will continue into 2015. The team is also providing additional training on InfoPorte and on the chartfield structure.

As always, you are encouraged to submit questions, concerns and suggestions through the Help Desk by calling 919-962-HELP or online at http://help.unc.edu/ .

System Transactions
The new system is performing routine administrative functions including personnel actions, payroll, purchasing, accounts payable and journal processing smoothly. System transactions between October 1 and mid-December 2014 include:
- Human Resources
  - Processed more than 22,000 HR transactions
  - Completed the Annual Raise Process (ARP) for EPA faculty and non-faculty
- Payroll
  - Successfully ran 7 Bi-weekly payrolls, posting all transactions to the general ledger
  - Successfully ran 3 monthly payrolls, posting all transactions to the general ledger
- Procurement
  - Issued more than 24,000 Purchase Orders

- o Paid almost 99,000 invoices
- Accounting Services
  - o Processed hundreds of journals
  - o Processed more than 13,000 deposits
- Help Desk and Business Support Groups
  - o Answered more than 3,400 calls
  - o Closed 9,471 help requests

Current Focus Activities
- Continuing to fix problems and improve processes
- Issuing payrolls
- Closing November 2014 and December 2014
- Preparing for year-end tax reporting
- Formulating plans for the remainder of the academic and fiscal year

Additional Information
ConnectCarolina User Information website: http://ccinfo.unc.edu/
ConnectCarolina bi-weekly email newsletter sign up: http://ccinfo.unc.edu/news/newsletter-sign-up/
Reporting information and sign up for email newsletter: http://ccinfo.unc.edu/reporting/
Issues and fixes: http://ccinfo.unc.edu/issuesfixes/
Online forum: http://ccinfo.unc.edu/forums/ (share tips and ask questions with colleagues)

We appreciate your patience and your continued support as we continue to deliver on solutions and work with you on the transition to the University's new administrative system. As always, please do not hesitate to be in touch if you have any additional questions or concerns. Thank you.