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To:

Cc:

Subject: April 2 -- ConnectCarolina Finance Update
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ConnectCarolina

Finance Division Update

April 02, 2015

This Finance Division Update email is for Business Managers, MOU Leads, ConnectCarolina Finance Liaisons, Finance Council, 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! New Option for Receiving by Purchase Order (PO): A new menu path, ePro > Add/Update Receipts by PO, is now available for campus users to create a receipt for goods or services based on a PO number or a vendor's ID. This means users can now enter receipts themselves for any PO that does not allow receiving by requisition, situations where the PO number is known but not the requisition number, or for 'W' or 'P' POs that were transferred from FRS to ConnectCarolina. For instructions see [Creating a Receipt by Purchase Order](#) that is located on the [Resource Documents](#) webpage.

NEW! Labor Encumbrances Update: On Tuesday, March 24, labor encumbrances were removed from ConnectCarolina Finance. A [memo](#) sent yesterday announced that changes to the data will not be viewable in InfoPorte until Monday, April 6.

NEW! CBM/Bill Presentation: Training manuals for [Customer Billing Management](#) and [Bill Presentation](#) applications are now available at [finance.unc.edu>Training](http://finance.unc.edu/Training).

NEW! Formula Allocation: On Wednesday, April 1, a [notice](#) was sent regarding a business process change for the formula allocation for Facilities and Administrative (F&A) funds. In ConnectCarolina, the formula allocation budget will be allocated every year on a non-recurring basis.

NEW! Budget Definitions: Earlier today, a memo about Final Changes in PeopleSoft Commitment Control Budget Definitions for FY 15-16 was sent to MOU Leads. Look for a broader communication to campus next week.

NEW! Vouchers: Beginning April 2, users can delete *vouchers they have personally entered*; and will no longer have to contact Disbursement Services. A [memo](#) on this topic was sent earlier today.

NEW! InfoPorte 6.4: InfoPorte 6.4 will be released to campus on Monday, April 6. We will send a communication and release notes on Monday, and they will be posted at <http://ccinfo.unc.edu/reporting/>. Due to the spring holiday, a webinar on this release will take place Tuesday, April 7 from 1-2 p.m. The link to the webinar can also be found on the reporting section linked above.

Important Reminders

Year-End Close Prep Course: There are multiple sessions of the course *Preparing for Year-End Close: Reviewing Open Transactions* will discuss how to identify open (unposted) transactions and either delete or process them, in preparation for year-end close. Refer to the [ConnectCarolina training calendar](#) for dates and times.

Consolidated Info from Finance Updates: A table that consolidates information from all Finance daily/weekly updates is now online, organized by topic and searchable on the [ccinfo website](http://ccinfo.unc.edu/finance/)>Finance tab:
<http://ccinfo.unc.edu/finance/>.

Questions

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.

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.