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To:

Cc:

Subject: June 5 -- ConnectCarolina Finance Update
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ConnectCarolina

Finance Division Update

June 5, 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! Year-End Deadlines: Next Friday, June 12, marks the beginning of a series of key dates for fiscal year end. Please use the [memo](#) and [checklist](#) as a guide during this first year-end close! Remember that there is not **one** month-end close date for June, but rather there are a series of month- and year-end close dates.

NEW! Campus Journal Import: A memo providing clarification about the Journal Import functionality was sent to MOU Leads earlier this week. This functionality is available to users with enhanced access. [Instruction materials, guidelines and a template](#) are available for use by designated staff.

NEW! Earnings Codes Mapping: A communication was shared regarding an issue with earnings codes mapping. Please review the details [here](#).

NEW! CBM-Bill Presentation: [Information](#) detailing several new updates was sent on Tuesday. Two new GL Accounts for room and parking service charges and room charge corrections are now in place.

Short-Term Retro Tool: We have received questions about the various statuses available in the short-term retro tool. Information about status designations is on page 13 of the [Entering a Retroactive Funding Swap training document](#).

Important Reminders and Resources

Year-End Checklist Available for Campus: To aid with Year-End planning on campus, a "Fiscal Year-End 2015 Task Checklist for Campus" file is available on the [ConnectCarolina Information website](#). This checklist is a supplement to the [Year-End memo](#) sent to campus on May 5.

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.

June Finance User Group Meeting: The topic will be Customer Billing Management and Bill Presentation. Join us June 19 in Room 103 of the Stone Center.

ConnectCarolina and InfoPorte Survey and Video: Check out the [video](#) on four key updates regarding ConnectCarolina and take the [survey](#). This survey is anonymous. However, if you would like to be entered in a drawing to win iTunes gift cards, please enter your email address at the end of this survey.

Interest in CBM/Bill Presentation Training: In an effort to determine what Customer Billing Management and Bill Presentation training is needed, we are asking for your input. If you are interested in viewing or attending CBM/BP training, please email your interest to financetrainer@unc.edu. Note: This is not a registration for training, but a request for a "show of hands" to determine training needs.

REMINDER! Auto Vendor Catalog Requisition Cancellation: In preparation for year-end, the system will begin

automatically cancelling any ePro Vendor Catalog requisition more 30 days old where an order has not been created. The first such cancellation process will run early next week. On June 15, ALL ePro Vendor Catalog requisitions that have not been sourced will be cancelled, requiring them to be reentered if a new order is appropriate. Beginning June 16, users can begin placing orders on fiscal year 2016 funding.

Questions

Users should utilize the Business Systems Help Desk when they are unsure who to contact for issue resolution. 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.

Users can reach the Business Systems Help Desk at 919-962-HELP or via a remedy ticket submitted 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.