Faculty Council

ConnectCarolina / InfoPorte Update

March 20, 2015
How you are fixing the problem with charges going into suspense accounts rather than being charged to my grants

• Short term
  — End dates for 631 grants were extended on 3/8 for multi-year awards for which the university has expanded authority

• Long term
  — Reconfigure ConnectCarolina to recognize and control expenditures based on active budget period and status rather than project end-date
I have sponsors calling me asking why they haven’t been invoiced in several months. What do I do? Who do I call?

- Office of VC Research engaged Huron Consulting to assist with reconciling data to facilitate invoice preparation
- If sponsor requirements allow, invoices will be prepared for multiple periods to help reduce backlog
- Successfully drawing down funds from multiple Letter of Credit sponsors (NIH, NSF, etc.)
Suspense charges are tying up my departmental funds. How do I get that fixed?

• Short term retro fix went live 3/18
  — Enables staff to make retroactive funding changes by person by pay period
  — Permanent solution is expected to be in place by the end of the fiscal year

• Labor encumbrances
  — Labor costs are no longer be encumbered in error on ePAR forms
  — All labor encumbrances will be removed soon
  — New report will provide projected labor expenses through the end of the fiscal year
  — Permanent fix is expected to be in place by the end of the fiscal year
I keep getting calls from vendors who say they aren’t getting paid. When will these vendors get paid on time?

- Major effort in Procurement department has improved this
- Some issues may be related to staff adjusting to new chartfields and processes

<table>
<thead>
<tr>
<th>Vendors Paid</th>
<th>FY 14-15</th>
<th>FY 13-14</th>
</tr>
</thead>
<tbody>
<tr>
<td>October</td>
<td>19,280</td>
<td>33,987</td>
</tr>
<tr>
<td>November</td>
<td>36,190</td>
<td>29,720</td>
</tr>
<tr>
<td>December</td>
<td>29,869</td>
<td>27,042</td>
</tr>
<tr>
<td>January</td>
<td>31,503</td>
<td>33,026</td>
</tr>
<tr>
<td>February</td>
<td>30,980</td>
<td>25,001</td>
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I don’t know how much money I have left to spend. Financial reporting isn’t what it needs to be. How are you going to fix it?

- New releases of InfoPorte every 3-6 weeks
  - Total focus on financial reporting
- Financial Reporting Task Force
- New Finance Council for oversight of financial reporting
- Focused on reports required for year-end
  - By the end of April will release additional reporting capabilities that will assist with balances (Trial Balance, Fund Balance, and Cash Balance)
- Adding dedicated reporting resources to both Finance and ITS
- Adding training and developing a User Guide for InfoPorte
People in my departments continue to have problems understanding how to use the system. What can I do to get them trained and more productive?

• Continuing support:
  — Additional training available; refer to Training Calendar on [http://ccinfo.unc.edu/](http://ccinfo.unc.edu/)
    o Webinars
    o Live demos in large venues
    o Computer-based training
  — Outreach
    o User Group monthly meetings; also, formed Liaison groups for two-way communication

• Not business as usual; will take time and effort to master new system
When are things going to be back to normal?

- Major change with NEW chart of accounts, business processes, budget rules, applications, reporting system
  - Not unusual to experience reduced productivity in the early months
  - Big learning curve
  - Bugs, business process snags, miscalculations about what would work – all contribute to uncertainty
- Many things are working, but many things remain to be done
- Go-live is only the beginning of the journey
  - Current phase: stabilization
  - Next phase: taking advantage of new capabilities this modern system provides
Why this system?

Why did you choose PeopleSoft and who was consulted?

• Many campus conversations going back to 2004-2007
• Planning and Implementation Oversight Group (PIOG):
  — Explored off-the-shelf software vendors
  — Investigated projects at similar universities
  — Looked at cost of similar projects
• Fall 2006: Request for Proposal process and vendor demos
• PeopleSoft was selected as the vendor in 2007 for
  — Campus Solutions – went live in 2009-10
Did you involve campus in designing the system?

• 2009-2010: Finance and HR/Payroll Stakeholders groups

• From 2011 on, engaged Campus Working Groups
  — More than 200 representatives of every school and division; appointed by Deans
  — Reviewed requirements and helped with testing; participated at every step of the process

• Numerous Town Halls held from 2012 to just before go-live
Was this system tested at all?

• Many months of intensive testing
  — Included business owners and campus users
  — Tested more than 2,500 business scenarios
  — Gathered feedback from campus users and central offices

• Not unusual to encounter problems post go-live
  — That’s why we have resources to react to new and unanticipated situations after go-live

• More on testing:
  — http://ccinfo.unc.edu/about/testing/
When issues come up, how are they addressed and/or fixed?

• Outreach for campus feedback
  — Engaging campus to evaluate and prioritize enhancements
  — HR and Finance Councils
  — Enterprise Applications Coordinating Committee (EACC)

• Monitoring issues
  — Help desk tickets for trends; daily meetings
  — Specific help desk queue for campus enhancement suggestions
  — Addressing largest pressure points
  — Adding needed functionality
  — Keeping up with system maintenance
Questions?