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

Vendors Paid		
	FY 14-15	**FY 13-14**
October	19,280	33,987
November	36,190	29,720
December	29,869	27,042
January	31,503	33,026
February	30,980	25,001

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/
    - 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 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
  - Finance -- live Oct. 2014
  - HR/Payroll – live Oct. 2014

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?