

Arts & Sciences Managers' Meeting Minutes

May 15, 2015

Speakers

Lachonya Williams
Assistant Dean, Human Resources

Laura Yurco
Assistant Dean, Finance

Andy Lang
Director, OASIS

Kathy Vreeland
Academic Applications Developer, OASIS

Finance Announcements

Year End:

Please remember to run your queries as often as daily to find transactions in error. Vouchers and requisitions will be charged against your funds even before they are paid so it's important to make sure to clear any items in error so you have accurate numbers. You can find the manual for how to run the queries here:

<https://ccinfo.unc.edu/files/2015/05/Preparing-for-Year-End-Close-Reviewing-Open-Transactions.pdf>.

Trust Fund ABC and Carryforward:

- For those trust funds on associated revenue starting in the new fiscal year budget will be created nightly based on how much revenue you generate (similar to how it worked in FRS). The 6/30 fund balance will be carried forward and created as budget for 7/1.
- If the trust fund sources are not on associated revenue (ie budget journals are submitted by the department to set up budget each year), budget will not be created nightly based on revenue but instead will have to be set up with a budget journal (similar to how it was done in FRS). Also these non-associated fund budgets will not carry forward.

Program Code:

Using Revenue vs Expense, for College of Arts and Sciences sources, please always use program codes for expenses and never use program codes for revenue.

Purchasing Gift Cards:

Please remember to not purchase gift cards on p-cards. [Click here for more information on allowable and non-allowed charges to p-cards.](#)

Automatic Deletion of Voucher Memo (see attached memo for additional details):

- Vouchers not submitted or approved will be deleted 30 days after the accounting date.

- Vouchers in denied status will be deleted 90 days after the accounting date.

Budget Controls:

Budget controls for state funds were lifted on May 1st. However, please pay attention to balances and do not overspend (the College will collect any overspent state funds in the new fiscal year). Departments with large surpluses or deficits in non-personnel state funds will be contacted. If you need assistance, please contact your Budget Analyst.

Important Dates/Reminders:

- Stewardship should be complete (was due May 11)
- Departmental Annual Report Summary due by Friday, May 22
- With Fiscal Year-end fast approaching, please review deadlines. If you're in the Business Center your deadlines are earlier to allow for data entry in the Business Center.
- Please note: Vouchers submitted after the 6/15 deadline will automatically be post-dated for 7/1 for all fund types (no exceptions!)

**HR
Announcements**

Post-Tenure Review Annual Reports are due in the Dean's Office no later than May 27, 2015. The template was attached to the email sent on 4/30/2015 and should be sent to Janet Farrell as a pdf file.

Performance evaluations of untenured Assistant and Associate Professors are due no later than May 25, 2015. The written summary should be placed in faculty member's file, a copy should be sent to the faculty member and the documents should be sent to Janet Farrell as an e-mail attachment. Please reference an email sent on 4/30/2015.

SPA Annual Evaluations are due June 30th and can be completed within the 60 day window.

The biweekly payroll close schedule for Biweekly 23 (5/4 – 5/17) has been changed: The early sign off deadline is because of the short pay period close timeframe due to the Memorial Day Holiday. Biweekly 23 (5/4 – 5/17) must be signed off by **5:00 p.m. on Monday, May 18th**. Sign off removal requests must be received by 4:00 p.m. that day.

**GradStar –
Jocelyn Brooks**

Reports are available in ConnectCarolina for awards entered in GradStar. Training for reports will be incorporated into the regular training sessions.

Check Your Access

Main Menu > Student Admin Menu > Reporting Tools > Query > Query Viewer

To Request Access

- Submit a request to the ARC (Access Request Coordinator) for your department.

- Ask for Student Administration > ConnectCarolina GradStar > GradStar, for role of PS Query. The ARC must submit the form through InfoPorte.

Available Reports

- Awards by Funding Department
- Awards by Student Academic Department
- Student Award Activity by Date
- GradStar Awards by Student/Term
- Remission Budget report

Using the Reports

- All of the queries begin with NC_GSTAR and can be downloaded as HTML or Excel.
- The default is to Search by Query Name, then in the “begins with” field enter NC_GSTAR and hit the Search button.
- Click on the word “Favorite” in the far right column to add the query to your favorites list.
- Many reports have prompts such as the student’s PID and the Term.
- Enter Term as a number, for example, 2152 for spring 2015.

Course Evaluation Tools – Andy Lang

- Digital Measures was previously used for electronic course evaluation instruments, but Digital Measures has since ended support for this service.
- Institutional Research has moved to using Scantron to conduct course evaluations.
- Previous course evaluations with Digital Measures cannot be directly accessed, but Institutional Research may be contacted for information previously stored by Digital Measures.

Changes in Distribution Lists – Kathy Vreeland

- OASIS has been working on updating how pre-populated lists are done. They will now be run through the Exchange server, rather than through the Lyris distribution lists.
- These pre-populated lists include lists by year, majors, minors, undergrads, grads, faculty, etc.
- Instead of using lastname@listserv.unc.edu they will now be lastname@unc.edu
- List access is still the same and permissions will carry forward.
- After June 1 all members of the Lyris lists that have been moved to the Exchange and they will be removed from the Lyris lists that are pre-populated.
- Whatever limits there are in terms of file sizes in Exchange will be applicable to the new distribution groups.
- Lyris will still be around for distribution groups that are not pre-populated.
- To view your impacted lists, you may visit dgm.oasis.unc.edu.