

Arts & Sciences Accounting Services Meeting Minutes

November 13, 2013

Speakers

Laura Yurco
Assistant Dean, Finance

Collette Wilshire
Assistant Dean, Business Center

Lachonya Williams
Associate Director, Human Resources

BMS

Follow the attached handout for a review of the process, to summarize:

- Use BMS in EPAWeb to figure out salary savings on your main state account to be transferred to your instructional budget
- Click “show projected info” to make sure you don’t move money encumbered for actions in progress
- When the NBX transfer posts the money will be pulled from the unallocated line so moving the savings down to the unallocated line will ensure a cleaner BMS and help you avoid confusion later
- After the month closes is a good time to do salary savings because the beginning/end of the month isn’t a good time to look in BMS because values could be off since payroll hasn’t synced.

PeopleSoft Updates

- October 2014 is the hard go-live date
- We will begin finance training July-September 2014
- There will be chartfield changes but we will give you more updates once they are finalized

Finance Updates

- Start-Up changes: Due January 10th
 - You can make adjustments now but we will send out a reminder
 - Send your revised spreadsheets to Laura or Sabrina
- Chron Inbox Instructions: See attached directions
 - Managers will only be able to add the Chron for Managers
 - You must follow the instructions for each device you use (iPad, laptop, desktop, etc.)
 - This will add a calendar of deadlines and upcoming meetings/events.
 - If you want to add events from the Managers’ calendar to your personal calendar, pull the event to yours and choose copy this occurrence
 - The inbox will only contain messages sent out after the inbox was created
 -

HR Updates

- Benefits open enrollment period extended to November 15th.
- Interim support for the Assistant Dean of HR - Lachonya Williams
- Phased Retirement
 - Applications due to the Dean's Office by December 13, 2013
 - Send applications to HR Consultants
 - Provost Office deadline January 6, 2014
 - Specific duties should be outlined
 - Teaching, research and service
 - Example on pp. 90 – 91 Chair's Manual (latest version 9/16/13)
- Update to website on salary increases for SPA and EPA NF
 - Now includes tips and examples
 - Highlights key changes
 - <https://hr.unc.edu/policies-procedures-systems/spa-employee-policies/compensation/non-faculty-salary-increase-interim-guidelines/>
- New submission deadlines for SPA and EPA NF increases ≥ 10%
 - All SPA increases over 10 percent must be submitted by the **1st** and **15th** of each month.
 - EPA non-faculty increases over 10 percent that are the result of a competitive event, must be submitted by the **1st** and **15th** of each month. (recruitment or retention)
 - All EPA non-faculty increases over 10 percent that are **not** the result of a competitive event must be submitted by the **1st** of each month.
 - For faculty, follow the published calendar on the APO website.
- Ongoing data cleanup activities for PeopleSoft conversion. Thank you for compliance and assistance.
- Please see email from Laurie dated 11/1/13 containing information on PeopleAdmin changes/modifications.
- Priority applicants need to be interviewed
 - Layoff and veteran's preference
- EPA Web and HRIS Trainings for CAS only being planned. Contact Lachonya if interested.

Other Updates

- Managers' Meeting Format: Talk to your staff and we will discuss it at the next managers' meeting
 - Would you like to change the meetings to be every month?
With appointed times for HR/Finance?
 - Should Student Services meet more than quarterly?
- Cost Codes – Reports in InfoPorte must be run separately if using more than one cost code because the reports will double the amounts used. (This will be fixed in PeopleSoft)
- Attached is a Business Center/Dean's Office contact list that has each employee's duties listed
 - Those who use voiceover IP have the area code + phone number listed so you know to dial the whole number

How to use BMS to process buyout and leave NBX revisions

1. Login to EPA Web: <https://itsapps.unc.edu/hrweb/>
2. Go to: EPAWeb link on left hand column
3. Go to Budget Mgmt-Budget Inquiry

4. Enter Department #, then click the search button, enter account number in format 2-XXXX1-1310 or click on magnifying glass to see list of account numbers, then click GO
5. To see funds available from leaves and buyouts look at the gray column called “EPA Current BBA.” (to see how any actions in progress affect your numbers click “show projected info”)

Budget Inquiry: Last posting through Pay Period Ending 2011.09.25

Cancel Show Projected Info

	FRS Permanent Budget (Future Year)	EPA Permanent Budget	FRS Current Budget		FRS BBA	EPA Permanent FTE (Control)	EPA Current FTE (Control)
2-32041 - 1310 Department 3204	2,283,256	2,283,256	2,283,256		87,204	29.8	29.8

Pid	Commit #	Name	Base Dept	EPA Permanent Budget	EPA Current Budget	Dist Amount	Dist FTE	FRS Actuals	FRS Encumbered & Encumbered	FRS Actuals Encumbered	EPA Current BBA	EPA Permanent FTE	EPA Current FTE
			3204	72,150	72,150	72,150	1.00	18,038	54,112	72,150		1.00	1.00

6. Once you figure out how much money is available in your 1 account (2-XXXX1-1310) and needs to be moved based on buyout rate/leave amount go to Budget Mgmt-Budget Distribution
7. Enter Department #, then click on magnifying glass to identify which account number you want to view, or enter in format X-XXXXX-XXXX, then click GO
8. You will make your changes in the “EPA Current Budget” column only
9. Enter the amount you want to move to your instructional account by subtracting the amount in the person’s name and adding the amount to the unallocated line. These two amounts should total zero. Click Save.

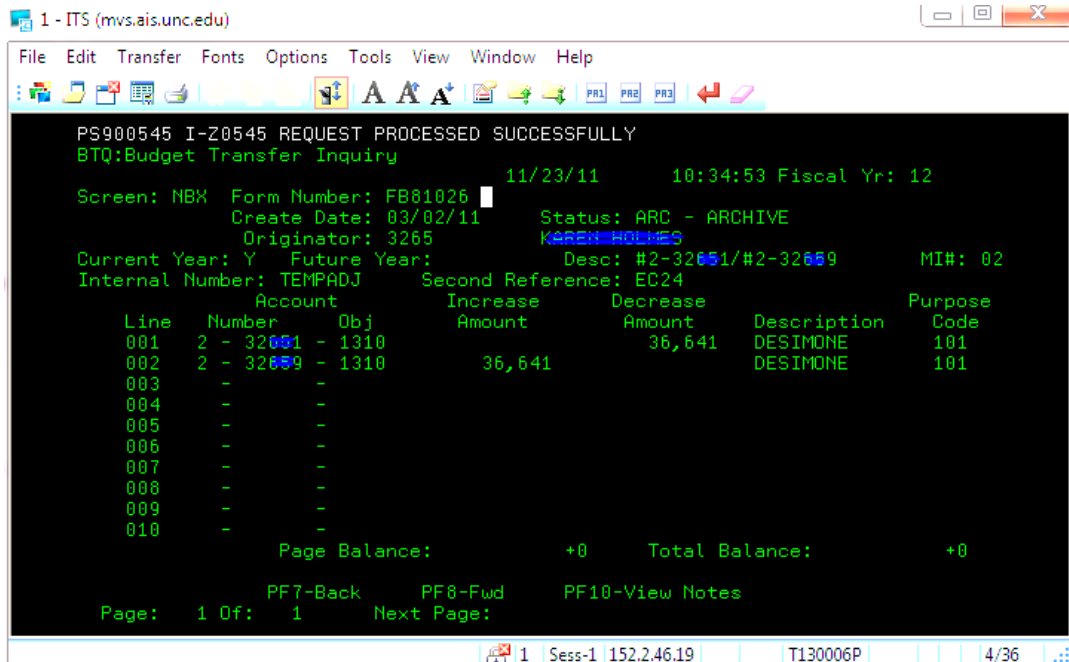
Del Employee Pid	Commit#	Name	Base Status	Dist. Amt	EPA Perm Budget	EPA Current Budget	EPA Permanent FTE	EPA Current FTE
702294633	2009006	Caddell, Joseph	3291 A	12,000	Original Difference	New	Original Difference	New
	9999999	Temp Employee Commitment		44,692	29,791	29,791	23,791	23,791
	9999999	Unallocated					2000	

10. Now submit your NBX revision. Be sure to include notes on who the buyouts/leaves are for and the amounts (see specific directions on page 2).

How to create and submit NBX Revisions for Salary Savings (Buyouts/Leaves)

1. To access the screen, type *NBX* in the screen field and press enter.
2. From the NBX screen, hit the *F6* key (to add) for first screen to appear.
3. Place a "Y" in current year, (this is a temp budget transfer for current year only)
4. TAB to enter a brief description (limited to 20 characters). This description is what will be seen on the NBX screen (inbox). However, this description will not appear in FRS.
5. Add MI #
6. Press TAB key to move the cursor to the Account Number field and enter the account number and object code (from your main 1 account to your instructional 9 account).
7. TAB to the appropriate column (Increase or Decrease) and enter the whole dollar amount for that object code (no commas necessary).
8. TAB to Description field. This field is optional, but may be helpful when you review FinanŞeer, InfoPorte, FRS, and your statements. In FinanŞeer, the contents of this field appear in the column titled ID. Enter up to eleven characters to identify transaction (such as name, position number, or purpose).
9. You may continue to enter transfers. The sum of the Increase amount column must total the sum of the Decrease amount column.
10. Once all information is entered, hit enter to validate. A form number will then be assigned after the data is verified in accordance with the budget rules. It will calculate the balance of increases, net of decreases and display this balance at the bottom of the page.
11. Press F6 to enter the justification. Please note the justification on the notepad is required before the form will be submitted. Give a brief description of this budget transfer. What will the transfer accomplish?
 - For these transfers include why you are transferring the funds, who the transfer is for, what caused the salary savings (ie leave or buyout) and the dollar amount.

**We strongly recommend that you enter the buyouts and leaves separately for each person because this will make staffing workload much easier to manage in the future without having to look up the revisions in the system.

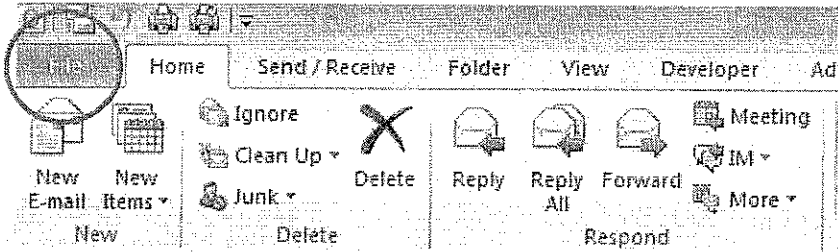


Accessing the Chron Inboxes (from Outlook client)

For instructions on adding the folders to your Outlook Web App, see page 5.

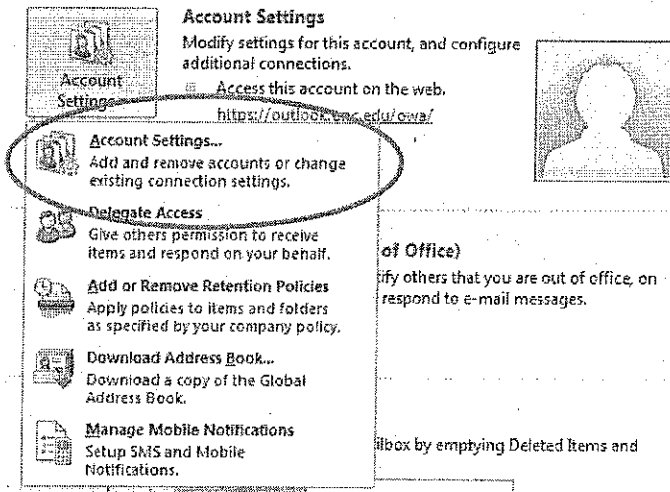
Open your Outlook client.

Click on the File tab.

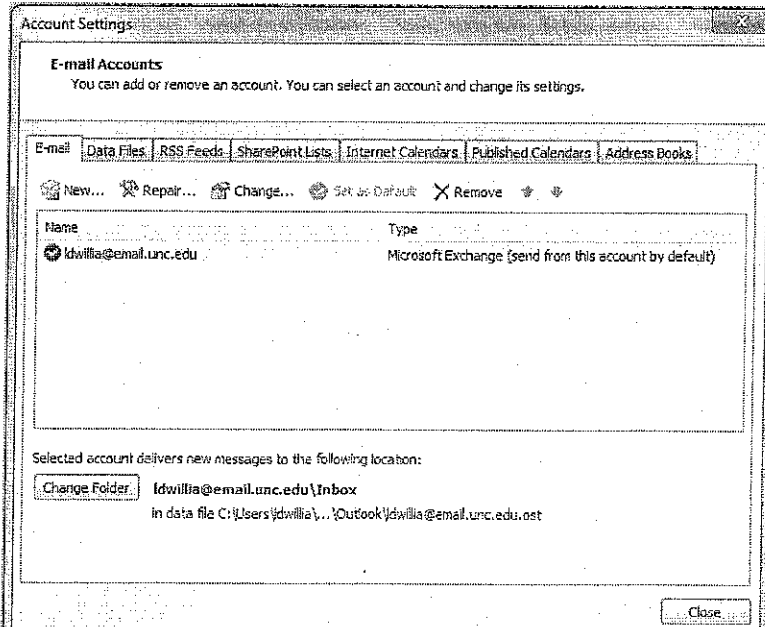


Click on Account Settings.

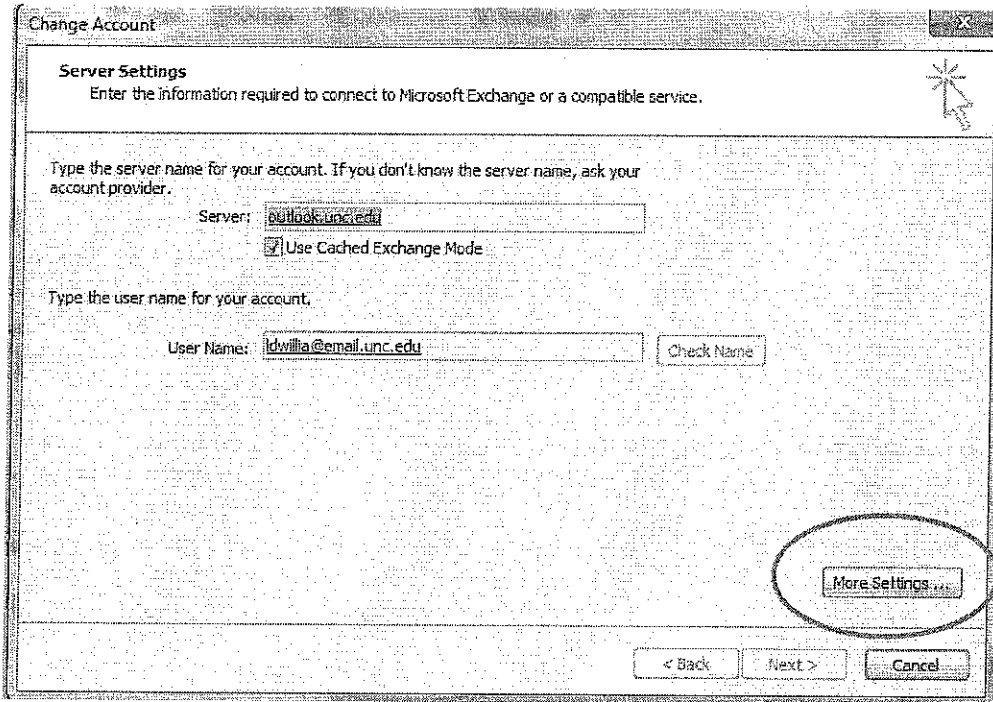
Click on Account Settings again.



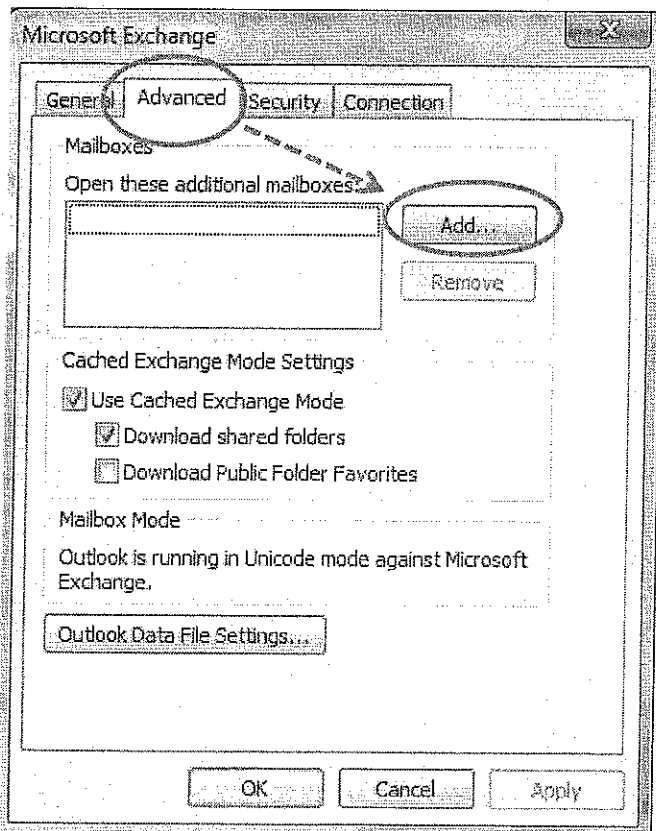
This will open the Account Settings/E-mail Accounts dialog box.



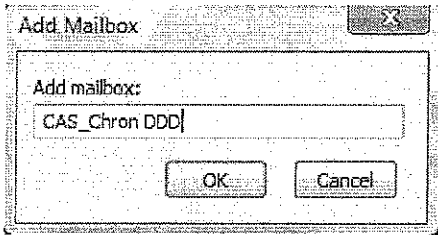
Double click on your email address under the Name column.
This will open the **Change Account/Server Settings** dialogue box. Click on **More Settings**.



This should open another dialogue box. Click on the **Advanced** tab. Then **Add**.

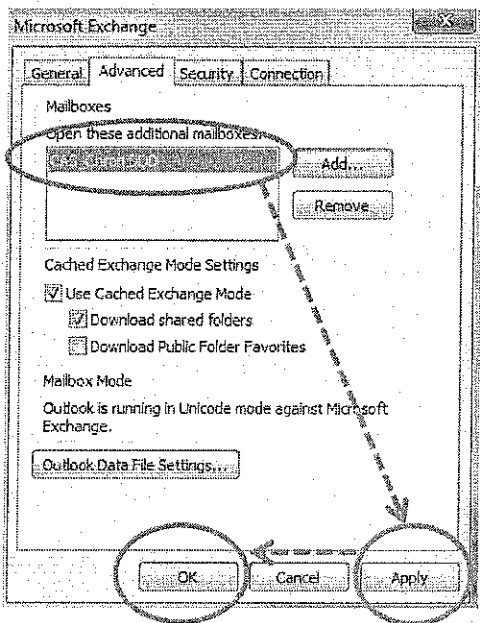


The **Add Mailbox** dialog box will open.



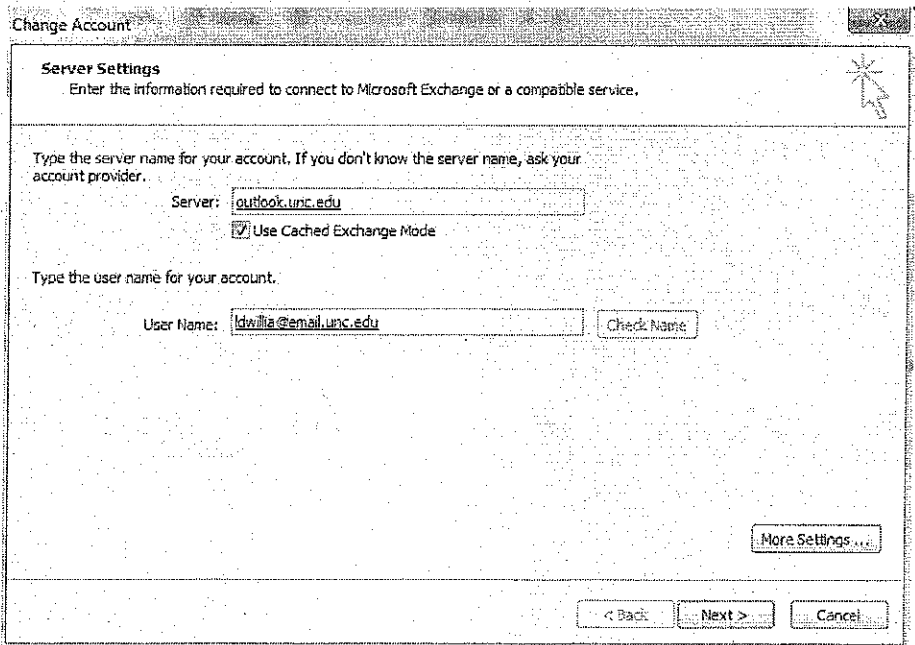
Type in either **CAS_Chron DDD** or **CAS_Chron Mgrs** and then click **OK**.

The mailbox name should appear in the dialog box. Click **Apply**. Then click **OK** to close this box.



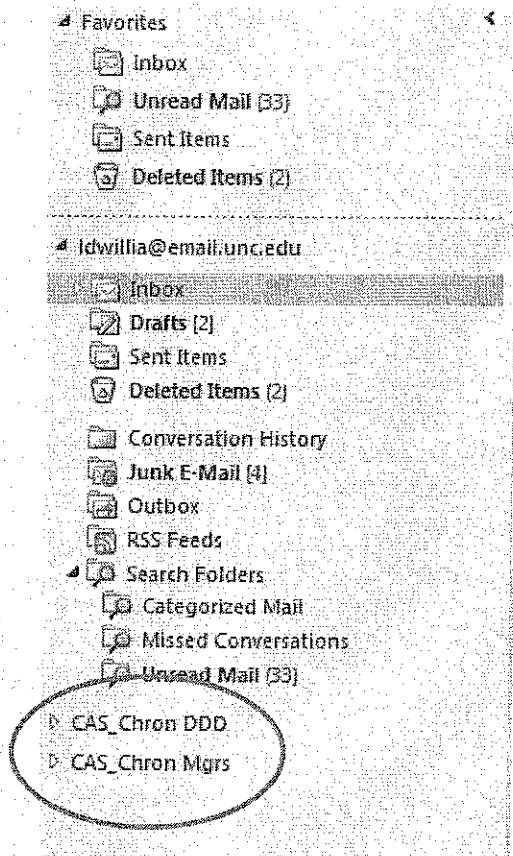
Note: If you are adding more than one chron inbox, you may click **Add** and type the name of the second inbox before clicking on **Apply** then **OK**.

This should bring you back to the **Change Account/Server Settings** dialog box. Click **Next** then **Finish**.



This will bring you back to the **Account Settings/E-mail Accounts** dialogue box. Click **Close**.

The Chron folders should appear in your Outlook client.



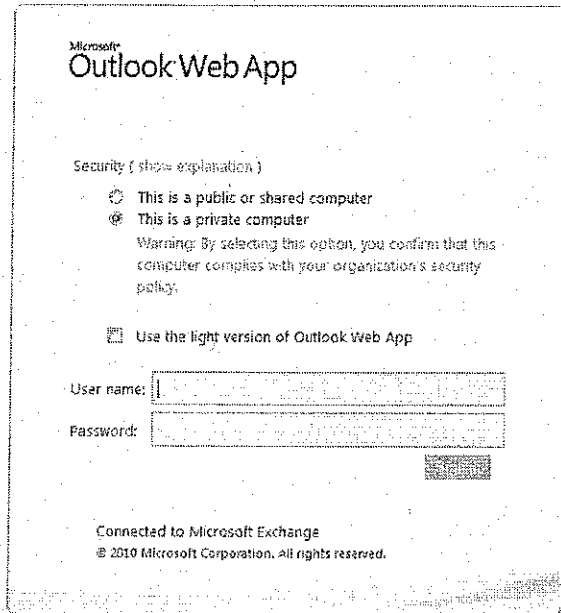
NOTE: If you use Outlook Client on multiple computers (a home computer or a computer in an alternate office location, for example) you will have to perform the above steps once for each computer you use to access Outlook Client.

The Outlook Web App, on the other hand, only requires you to add the Chron folder once, after which time you will be able to access Chron from any computer or device that you use to access the Outlook Web App.

Accessing the Chron Inboxes (from Outlook Web App)

Go to URL: outlook.unc.edu

Log in with your onyen and password.



Microsoft
Outlook Web App

Security (show explanation)

This is a public or shared computer
 This is a private computer

Warning: By selecting this option, you confirm that this computer complies with your organization's security policy.

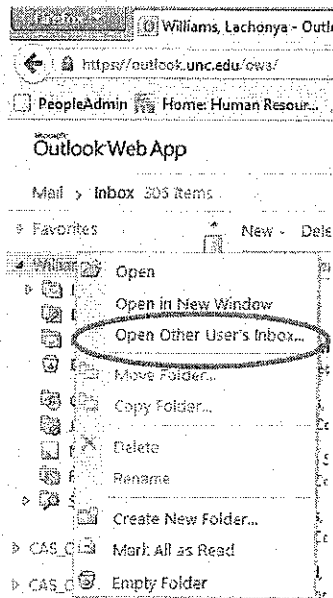
Use the light version of Outlook Web App

User name:

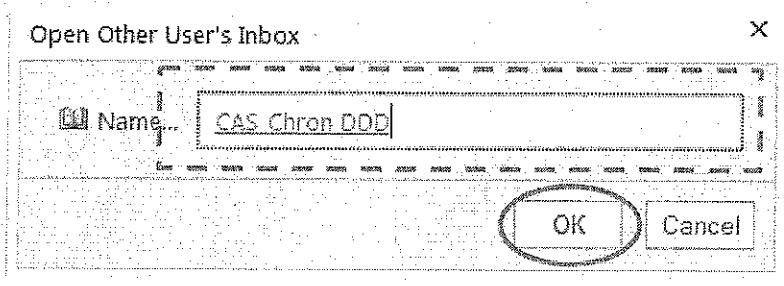
Password:

Connected to Microsoft Exchange
© 2010 Microsoft Corporation. All rights reserved.

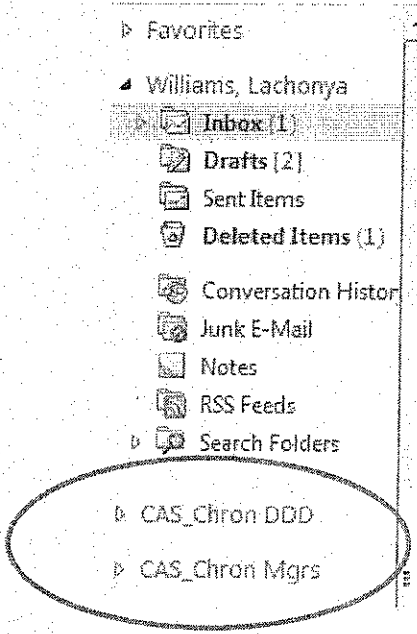
Right click on the account name (your name) above the inbox, and select **Open Other User's Inbox**.



Type either CAS_Chron DDD [cas_chronddd@unc.edu], or CAS_Chron Mgrs [cas_chronmgrs@unc.edu], and then select OK.



The Chron folders should appear in your web client.



Dean's Office Administrative Team Contacts

** Note - All numbers preceded by a (919) denote a VOIP number and you need to dial all 10 digits.

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Nadine Kinsey Interim Manager None kinsey@email.unc.edu None

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Jocelyn Brooks HR Specialist 919-843-6851 jocelyn_brooks.unc.edu Howell 103
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