Today’s Agenda

Information Technology Services - Security reminders

Human Resources
- Staff Employment - Summer hiring

Financial Services
- Treasury Services: Year-end reminders
- Controller’s Office: Year-end reminders and project updates
Emergency Information

- Emergency Exits
- Building Evacuation Assembly

Area of Rescue and Assembly Locations

- Emergency Contacts
  - Call Campus Police
  - From an Office Phone: 911
  - From a Cell Phone: 704-687-2200
**Today’s Agenda**

**Break** - 10 minutes

Financial Systems Support

- HR Systems Support: Kronos interface refresh
- Financial Systems Support: 49er Mart projects
Spear Phishing

Fewer generic emails

More emails ‘impersonating’ someone you know
From: IT Security
Subject: Action Required

We are investigating a phishing scam that is attempting to collect university information, including your personal information. Remember that we will never ask for your information in an email.

Please use our secure site to verify your personal information is accurate.

Regards,
IT Security
From: Jane Doe <jane.doe.uncc.edu@outlook.com>
Date: Thu, Feb 28, 2019 at 4:20 PM
Subject: Hello
To: xxxx@uncc.edu

Are you available? I will be going to a meeting with limited phone calls, Keep an eye on your e-mail. How close are you to a store?

Jane Doe
Dean, College of xxxx
From: Steven Smith <ssmith145@gmail.com>
Sent: Wednesday, February 13, 2019 11:06 AM
To: Carol <carol@uncc.edu>
Subject: Urgent Reply

Are you available?

Steven
The Bait

From: Steven Smith <ssmith145@gmail.com>
Sent: Wednesday, February 13, 2019 11:06 AM
To: Carol <carol@uncc.edu>
Subject: Re: Urgent Reply

I’m in a conference right now that’s why I’m contacting you through here. I can’t receive calls during the conference. I don’t know when the conference will be finishing up and I want you to help me out on something very important right now.

Steven
Did you get my last email? Text me right away. It’s urgent. I need you to help me get an iTunes gift card from the store. I will reimburse you when I get back to the office.

Please purchase iTunes Cards of $2,000. 4/$500 which you are going to get from the store. Scratch the back to see code and take a clear pictures of each cards code before you attach them to the email. I will be reimbursing you. Thank you
Your Click Can Spread.... Quickly

From: Nancy Abernathy - Wallace Printing <narrayago@univc.edu vo>
Date: Tue, Feb 12, 2019 at 5:21 PM
Subject: new invoice from Nancy Abernathy - Wallace Printing
To: < 

Nancy Abernathy - Wallace Printing

Your Nancy Abernathy - Wallace Printing new Invoice

Account Number: Z802506

<table>
<thead>
<tr>
<th>Invoice Number</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>657146</td>
<td>734.49</td>
</tr>
</tbody>
</table>

Click to connect eInvoice billing System

eInvoice Connect

If the link does not work directly please click or copy the following URL and paste it on your browser address bar:

http://soc.accounts.resources.com/

Thank you for using Nancy Abernathy - Wallace Printing

Wednesday, April 17, 2019
What You Can Do

Think before you click

...especially when on a mobile phone

Verify it’s genuine before you reply

Check with the sender (by phone or separate email)
Report

If You Click and Then Become Suspicious....

REPORT it to ITS
ReportSpam-Group@uncc.edu
Human Resources -
Staff Employment

Tracy Worthey, Director of Staff Employment, Ext. 7-0670
# Student Employment - Summer Hiring

<table>
<thead>
<tr>
<th>Reminders</th>
</tr>
</thead>
</table>
| ● Students are limited to 20 hours a week if they are enrolled in a summer class.  
● Can work up to 40 hours a week, if they are not enrolled in summer classes and show enrollment for this spring and the coming fall.  
● Adhere to the [EPAF and time sheet submission deadlines](#).  
● If your student is graduating, please ensure that their assignment has been ended appropriately. |
| Note: They can work until the end of May on a student assignment. |
# Student Employment - Summer Hiring

| Resources | • PIM 63: Process Deadlines and Requirements for Hiring and Paying Temporary Employees  
|           | • Student employment resources, e.g., pay ranges and job descriptions. |
| Coming Soon | • Foreign Nationals will need to register for a workshop or a walk-in session, prior to attending the session. Once confirmed for the session, they will receive an email to complete section 1 of their Form I-9.  
<p>|            |   ○ More information and process links are forthcoming |</p>
<table>
<thead>
<tr>
<th>Contacts</th>
<th>Student Employment: Teresa Shook, <a href="mailto:tshook4@uncc.edu">tshook4@uncc.edu</a>, 7-0671</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Temporary Staff: Preston Moran, <a href="mailto:pmoran@uncc.edu">pmoran@uncc.edu</a>, 7-5224</td>
</tr>
</tbody>
</table>
Run a Trial Balance report for funds in your org. (will list cash balances for every fund in the org(s) you have access to and should be reconciling):

- **Report Central** << Departmental Financial/HR Reporting << Budget Availability/Trial Balance; select the Source Trial Balance radio button, enter G11000 in the account field, click Submit
YE Reminders: Fund Management

- You can get a current list of active funds in your org by running a Fund List Report from the Fund List tab in Report Central.
**YE Reminders: Deficit Cash**

- Use the trial balance report generated to identify funds in deficit (cash with credit balances)
- Treasury Services moves available funds from the related Foundation Fund monthly, more frequently in June
YE Reminders: Deficit Cash

● Submit Financial Transaction Requests (FTRs) to cover the deficits
  ○ It’s best to move an expense to a fund that will allow that expense
  ○ Transfers from a similarly restricted fund or unrestricted fund may be another option
● We cannot close the year with deficits
● Keep vacation schedules in mind for FTR issuers and approvers
● Deficit coverage deadline for FTRs is June 24, 2019
A “dormant” fund is considered to be one in which there has been no activity during the current fiscal year.

In particular, look at funds that have not had any expenditures during the fiscal year.
YE Reminders: Fund Changes

● Fund org changes must be in by June 14th so they can be keyed effective July 1, 2019

● Have any other fund set up or changes submitted in a reasonable time to allow for processing during the busy year end season

● Questions? Email Treasuryservices@uncc.edu
New Faces in the Controller’s Office

Alicia Bartosch, Assistant Controller-Compliance

Get to know Alicia
Vacancies

Controller’s Office

● Assistant Controller-Bursar - search in process
● Bursar’s office contacts until this position is filled
  ○ Student Accounts/Third Party Billing: Angela Allen
  ○ Cashiers: Nicole Haire
  ○ Collections: Neil Jones
  ○ Accounts Receivable/Reporting: Greg Husted
  ○ Other: Laura Williams
Year-end Reminders

The 2019 Fiscal Year-end Disbursements Cut-off Calendar memorandum is available.
Year-end Reminders

Mobile Communication Device (MCD) Allowance Renewals for FY19

- Due by May 31, 2019
- Access the related policy, procedures, eform, and FAQs on the MCD Allowances webpage
- Sample audit will be completed this year
Out of State Employees

Tax Requirements

● **New webpage resource: definition and procedures**
  are available to assist you if you are considering hiring an employee who primarily resides out of state

● Faculty Teleworking Attestation Form - is forthcoming
Other Updates

- Leave attestation results from 2018
  - 80% positive response rate
- PATH project - ITS development begins soon
- P-card distribution - Will pick up from Cashier’s Office starting in May
- Moving Support - Tweaks to process
  - Pre-approval - can be submitted by admin staff
  - Exceptions - clarification on what information should be submitted
- Student/Temp Payroll - Project to change from monthly to biweekly is in early planning stages
Financial Systems Support
HR Systems Support

Interface Refresh

Vicki Turman
Asst. Dir. HR Systems Support
Ext. 7-0810

Donna Cochran
Kronos System Administrator
Ext. 7-6110
**Interface Refresh**

**What?**  
**User Interface Refresh**  
Facelift for Kronos software including updated menus, navigation changes and new features

**Why?**  
**Improve Usability**  
New interface has the look & feel of other consumer apps you use every day  
**Version Compliance**  
Current interface is at end of life

**Who?**  
**Hourly Staff**  
Punch In/Out & review their timecard on a PC  
**Exempt Staff**  
Time off requests & view leave balances  
**Supervisors**  
Approve timecards & time off requests
Interface Refresh

When?
When will the Kronos interface change?

What?
What will be different?
What will not change?
New Kronos user interface refresh implementation

**Fall 2019**

- **September 2019**
  Dept. Timekeeper training & transition
- **October 2019**
  Supervisor & Exempt training & transition
- **November 2019**
  NonExempt training & transition
Interface Refresh

[Image of a Kronos interface refresh showing clock and time statistics]
Interface Refresh
# Interface Refresh

## Timesheet Edit

**Time Sheet: March 17, 2019 - March 30, 2019**

### SUN 17
No Data

### MON 18
- 000096
- Mon 18
- 8:00a  5:00p  9:00  8:00
- 8:00a - 5:00p w/ Lunch Deduction
- Day Total: 9:00  8:00

### TUE 19
- 000096
- Tue 19
- 12:00p  5:00p  5:00  5:00
- 8:00a - 5:00p w/ Lunch Deduction
- Day Total: 5:00  5:00

### WED 20
- 000096
- Wed 20
- 10:00a  5:00p  7:00  6:00
- 8:00a - 5:00p w/ Lunch Deduction
- Day Total: 7:00  6:00

### THU 21
- 000096
- Thu 21
- 8:00a  5:00p  9:00  8:00
- 8:00a - 5:00p w/ Lunch Deduction
- Day Total: 9:00  8:00

### FRI 22
No Data

### SAT 23
No Data
Interface Refresh

Next steps

Watch for future communications with the official release date and information about updated user guides, FAQs, and training opportunities.
Questions?
Financial Systems Support

49er Mart Projects

Elizabeth Palian, Asst. Dir. Financial Systems Support, Ext. 7-0282
Amazon Punch-out Catalog

What?
Amazon Business Punch-Out catalog in 49er Mart is replacing existing Amazon accounts used by campus departments for University purchases with one main UNC Charlotte Business Account.

Vendor: Amazon Capital Services

Why?
Quick review: Improve Purchasing Office ability to quickly review departmental requests

Better reporting: Accurately report vendor spend to the state

When?
This project is currently on hold.
eCRs (Electronic Check Requests) Data

FY18 Data

- eCRs processed since transition of ATFs (After the Fact) to eCRs
  - FY18: 742 invoices / $20M
  - FY19 YTD: 2,412 invoices / $40M
eCRs (Electronic Check Requests) & You

What this means for you

- Starting next fiscal year (FY20), you would use eCRs instead of DPRs for everything except employee and student reimbursements
- Suppliers may need to be added in 49er Mart before eCRs can be initiated
- Accounts Payable is added to the approval workflow - reviews the attached invoice to compare/verify the data entry, e.g., supplier invoice # and amounts
eCRs (Electronic Check Requests) Timeline

Rollout Timeline

- Soft roll-out: 7/1/2019
- Hard change (mandatory): 8/1 or 9/2/2019
eCRs (Electronic Check Requests) Benefits

No more paper!

- More efficient / decreased processing time
- All disbursements - except employee and student reimbursements - would be processed through 49er Mart
eCRs (Electronic Check Requests) Benefits

Electronic workflow

- Approvers do not have to learn a new system
- Campus-wide visibility to status of payment
- Email notifications
- Ability to designate substitutes
**eCRs (Electronic Check Requests) Benefits**

**Better internal controls**

- Org approvers are maintained in 49er Mart
- Reliable audit trail
- Single data entry / reduces risk of error and redundancy
eCRs (Electronic Check Requests) Benefits

Details, Details, Details

- No receiving required (because no PO created)
- Supplier information pre-populates (once supplier is in 49er Mart)
- Chart of Account data (fund/account) are selectable
- Forms/Requisitions can be copied
- Also see the UNC System Conference presentation
What is this?

- Financial Services is working on a project (“TSM” = Total Supplier Manager), which will result in a supplier onboarding/self-service portal within 49er Mart.
- The terms “supplier” and “vendor” are used interchangeably.
- This is a supplier portal only (not a user portal; though users will be able to search for suppliers in 49er Mart as they do now).
49er Mart Supplier Portal Data

FY18 Data

● 3,000+ vendor forms processed in FY18
49er Mart Supplier Portal Go Live Timeline

Go “Live” timeline

- Starting sometime in fall 2019, the supplier portal will go live.
What this means for you

- The supplier portal will replace paper vendor forms (Vendor Information Form, Vendor Maintenance Form, Foreign National Information Form, Direct Deposit Form, Independent Contractor Form).

- The supplier portal is a self-service portal for suppliers so they can give us their vendor information directly in 49er Mart.
49er Mart Supplier Portal & You Cont’d

- Departments would send a “Request to Invite” to Vendor Relations, who would review the request and, upon approval, send an “Invitation” to the supplier.
  - The process would remain the same to look up vendors before sending a Request to Invite to ensure they do not already exist in Banner.
  - For supplier changes after initial registration, the supplier would use the portal and changes will progress through a review workflow.
49er Mart Supplier Portal Benefits

No more paper! Electronic workflow

- More efficient
- Campus-wide visibility to vendor setup status
- Email notifications
- Individuals do not have to snail mail/fax forms
Better internal controls

- All suppliers maintained in 49er Mart
- Reliable audit trail
- Single data entry / reduces risk of error and redundancy
- Suppliers can enter their own direct deposit information
49er Mart Projects: Next Step

Testing

- Include Business Officer Advisor Panel members, and any other willing groups, as test groups in UAT
The next Business Update is October 3 (tentatively)

Thank you!