ConnectCarolina: Frequently-Used Links

Note: In most pages, there will be a tab called “Find an Existing Value” and “Add a New Value”. Therefore, the links on this page will generally allow you to both review past transactions as well as add new transactions.

A. Creating Campus Vouchers

1. Create a campus voucher; review an existing voucher
   Main Menu → Finance Menu → Accounts Payable → Vouchers → Add/Update → Campus Voucher Entry

2. Run a voucher inquiry
   Main Menu → Finance Menu → Accounts Payable → Review Accounts Payable Info → Vouchers → Voucher

B. Creating Journal Entries

1. Enter a general journal entry
   Main Menu → Finance Menu → UNC Campus → Campus Journals → Campus Journals Entry

2. Search and review a journal entry
   Main Menu → Finance Menu → UNC Campus → Campus Journals → Campus Journal Validation

3. Review posted journals
   Main Menu → Finance Menu → General Ledger → Journals → Journal Entry → Create/Update Journal Entries

C. Requesting New Vendors and Vendor Changes

1. Review to see if a vendor exists in the payment system
   Main Menu → Finance Menu → Vendors → Vendor Information → Add/Update → Review Vendors

2. Request a new vendor profile or request a change to a vendor profile
   Main Menu → Finance Menu → UNC Campus → Campus Vendor

3. Request a new independent contractor
   Main Menu → Finance Menu → UNC Campus → Independent Contractor

D. University Deposits

1. Create a deposit (both cash or electronic/credit).
   Main Menu → Finance Menu → Accounts Receivable → Payments → Online Payments → Regular Deposit

E. Managing Budgets

1. Enter a budget journal or budget transfer; review an existing budget journal or budget transfer
   Main Menu → Finance Menu → Commitment Control → Budget Journals → Enter Budget Journals
   Main Menu → Finance Menu → Commitment Control → Budget Journals → Enter Budget Transfers

2. Run a budget overview inquiry
   Main Menu → Finance Menu → Commitment Control → Review Budget Activities → Budgets Overview
F. Purchase Requisitions and Receiving

1. Create a purchase requisition
   Main Menu → Finance Menu → eProcurement → Create Requisition

2. Manage an existing purchase requisition (copy, edit, cancel)
   Main Menu → Finance Menu → eProcurement → Manage Requisitions

3. Record receipts of goods/services; review receipts that you created or listed as the requester of record
   Main Menu → Finance Menu → eProcurement → Receive Items

4. Record receipts of goods/services for others
   Main Menu → Finance Menu → eProcurement → Manage Requisitions

5. Update requester preferences
   Main Menu → Finance Menu → Set Up Financials/Supply Chain → Product Related → Procurement Options → Purchasing → Requester Setup

G. Funding Swaps and Lump Sum Payments

For both Funding Swaps and Lump Sum Payments:

1. Main Menu → HR Workcenter
2. Click “ePAR Home Page” on the left pane.
3. Click “Start a new ePAR”.
   a. Choose Funding Swap, or
   b. Choose Lump Sum Payment