

### Departmental Systems

A number of departments use side systems, referred to as “departmental systems,” to meet reporting and information management needs not currently met by the University’s enterprise systems. Examples of departmental systems include InfoPorte and ITWorks. ConnectCarolina will change how data is made available to departmental systems.

ConnectCarolina supports departmental access to its data in four ways:

- through standardized nightly batch extracts; this data is not in real time
- through a limited number of Web Services; this data is in real time
- through reporting tools; this data is in real time
- through InfoPorte (the new data warehouse); this data is on a one-day delay

#### **Accessing Data via the Nightly Batch Extracts**

Access to ConnectCarolina data is provided through standard but flexible data extract files and data structures. Data gathered by nightly extracts is not tailored to individual departmental systems and is not in real time. Each night, ConnectCarolina

creates a set of generic data extract files, or flat files, based on predefined data requirements.

To keep the files secure, ConnectCarolina uses a service called Secure Network Storage, or Secure NAS. Each department has a designated folder in Secure NAS where they access their files, and they cannot see other departments’ folders. To further ensure that data is kept secure, departmental systems must also follow University IT security standards when accessing the data files.

(For more information about Secure Network Storage, refer to [\\secnas.unc.edu](http://secnas.unc.edu).)

*Note: If your department needs to make a change to your data file, submit a help ticket through the Help Desk.*

#### **Accessing Data via Web Services**

ConnectCarolina provides the following information in real time through Web Services:

- account combinations
- account validation
- business unit by Onyen
- chartfield attributes
- purchasing information
- requisition information

#### ***About Security and Access to Data***

Access to the standard data structures is controlled by the same security permissions as those in ConnectCarolina. If your departmental systems need broader access, that request must be approved by the same data owners who normally authorize system access.

#### ***ConnectCarolina is System of Record***

ConnectCarolina is the system of record. Departmental systems cannot serve as the system of record for data elements managed in ConnectCarolina, and cannot serve as a “front end” to ConnectCarolina. Departmental systems can capture and manage information not captured in ConnectCarolina and can transform ConnectCarolina data into formats, presentations, and analysis needed by departments, schools, and divisions.

## Accessing Data via Reporting Tools

For ad hoc access to real-time data, authorized departments will use the reporting tools available in ConnectCarolina. The reporting tools to access information in ConnectCarolina are:

- PeopleSoft Query
- XML Publisher
- nVision

A small group of users will have access to build reports using these tools, and a much broader group of users will be able to run reports using these tools.

## Accessing Data via InfoPorte

Authorized departments will have access to the new data warehouse through InfoPorte. A small group of users will be able to create reports using the SAS Analytics tool, which pulls data from the new data warehouse, and a much broader group will be able to run these reports through InfoPorte. The new data warehouse data is one day-delayed and is effective-dated, which means it allows point-in-time retrieval.

Campus users will also use InfoPorte to access a data dictionary that describes the data elements available in Campus Solutions, HR, and Finance. In addition, users will be able to look up chartfield codes and descriptions.

## Bringing Data into ConnectCarolina

### Importing Files into ConnectCarolina

Departments that have a high volume of recurring journal entries and vouchers will use a process to upload a large batch of journal entries and vouchers into ConnectCarolina. They will use a template to create a flat file and then place that flat file in a designated landing zone for pickup by ConnectCarolina. ConnectCarolina edits and budget checks the file, then imports and posts it in ConnectCarolina.

Authorized departments will also be able to upload budget information into ConnectCarolina through the Excel to Component Interface (CI) utility. This tool enables departments to upload budget data into ConnectCarolina using an Excel Spreadsheet utilizing all the business logic and editing provided by ConnectCarolina.

### ***No Direct Updates to ConnectCarolina Data Tables from Departmental Systems***

Departmental systems can pull information from ConnectCarolina, but they cannot directly push, post, or update data tables in ConnectCarolina. Exceptions to this policy must be approved by the ConnectCarolina Executive Sponsors.

## Data Flow

