Agenda

Topic	Presenter
ConnectCarolina Link is Moving	Anita Collins
Survey Results	Anita Collins
Student and Temporary “Autoterm” Reminders	Dave Turner
Direct Navigation	Ann Sager
Midstacks	Ann Sager
Comments in ePARs	Dave Turner
9.2 Update	Megan Keefe
Maximizing ePAR Search	Corrie Mimms

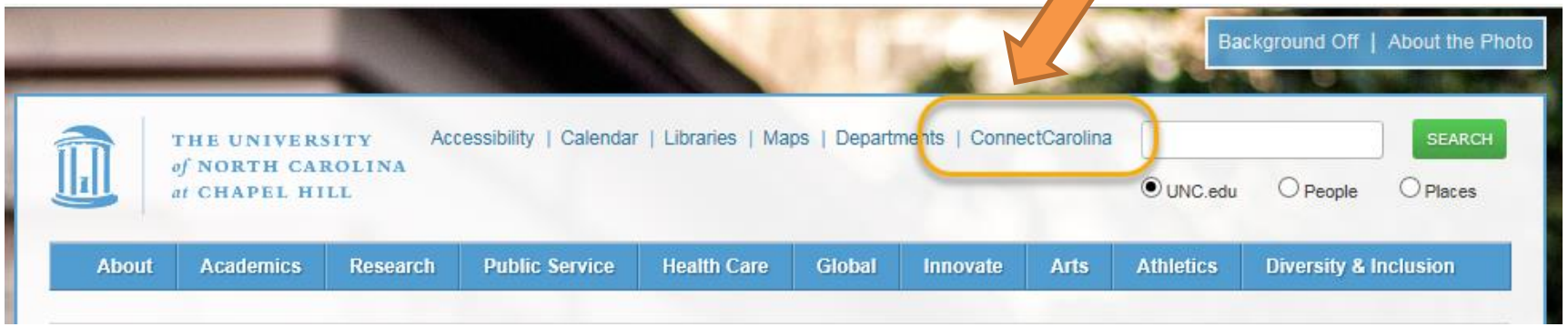
ConnectCarolina Link Is Moving

Anita Collins

Manager, Change Management ITS

Bookmark ConnectCarolina.unc.edu

This link is moving soon



Be sure to bookmark
connectcarolina.unc.edu
in your browser

Survey Results

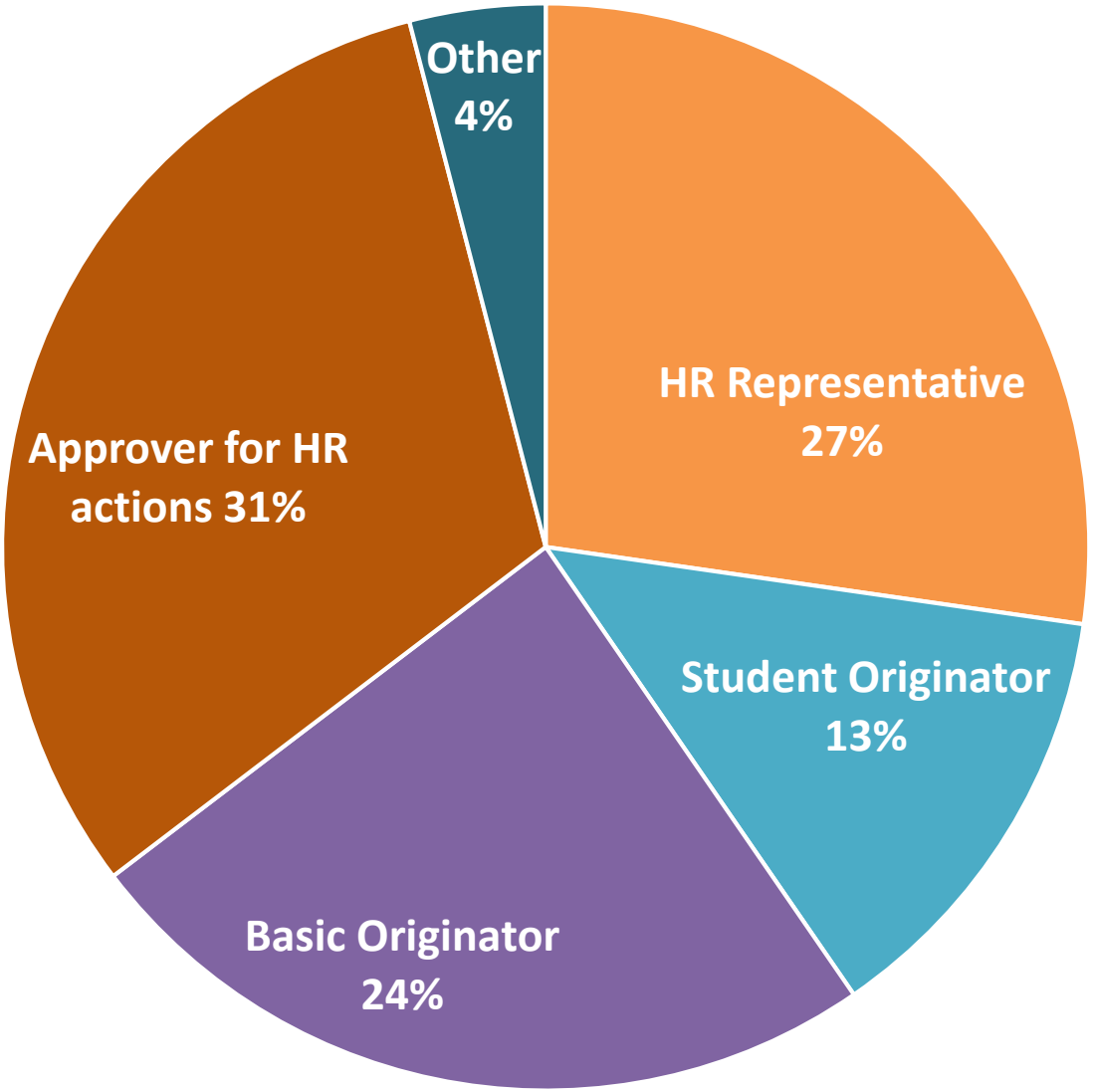
Anita Collins

Manager, Change Management ITS

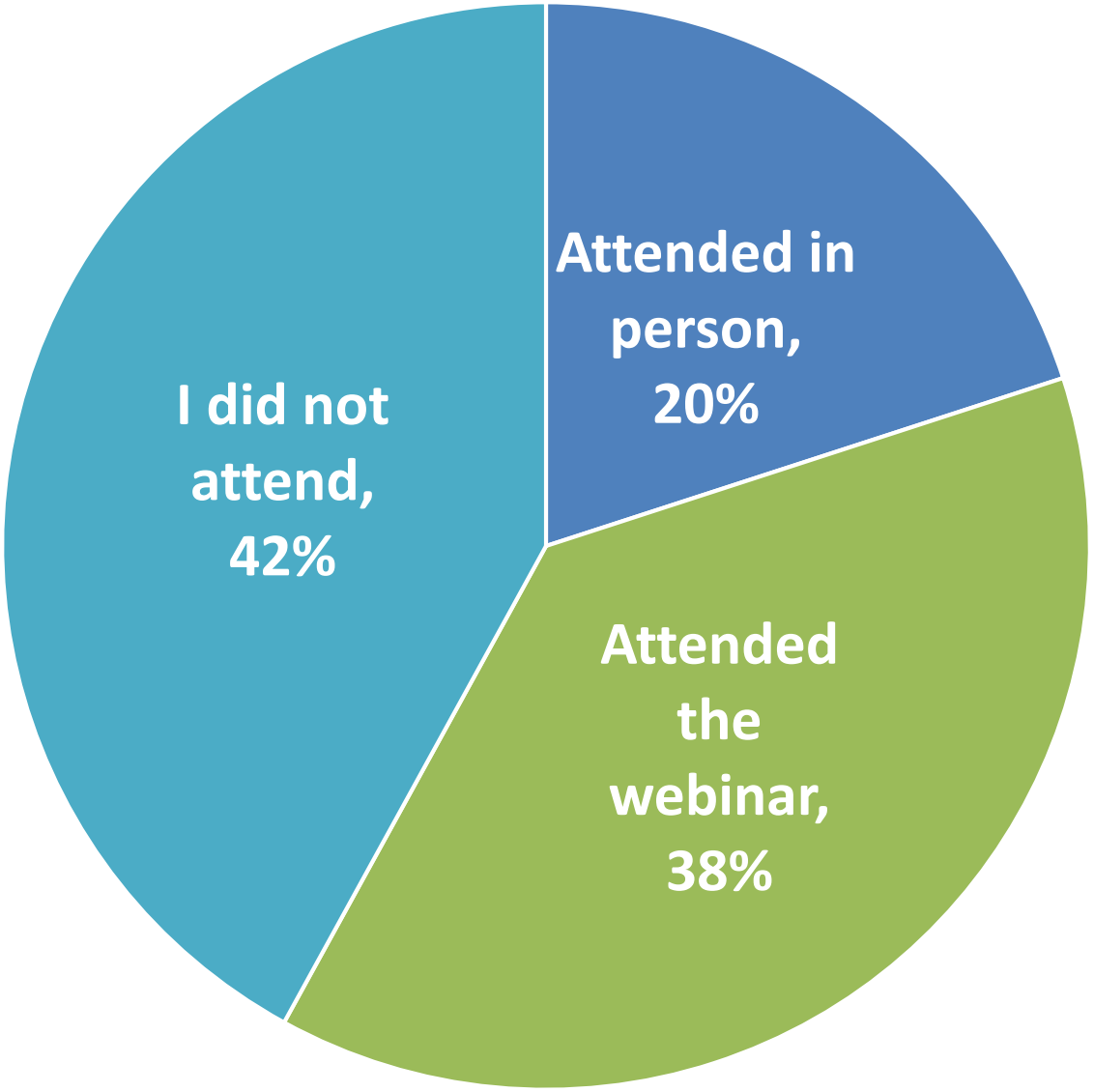
Who Responded

98

Responses



Attendance


Attended in person, 20%
Attended the webinar, 38%
I did not attend, 42%

Why did you attend or not attend?

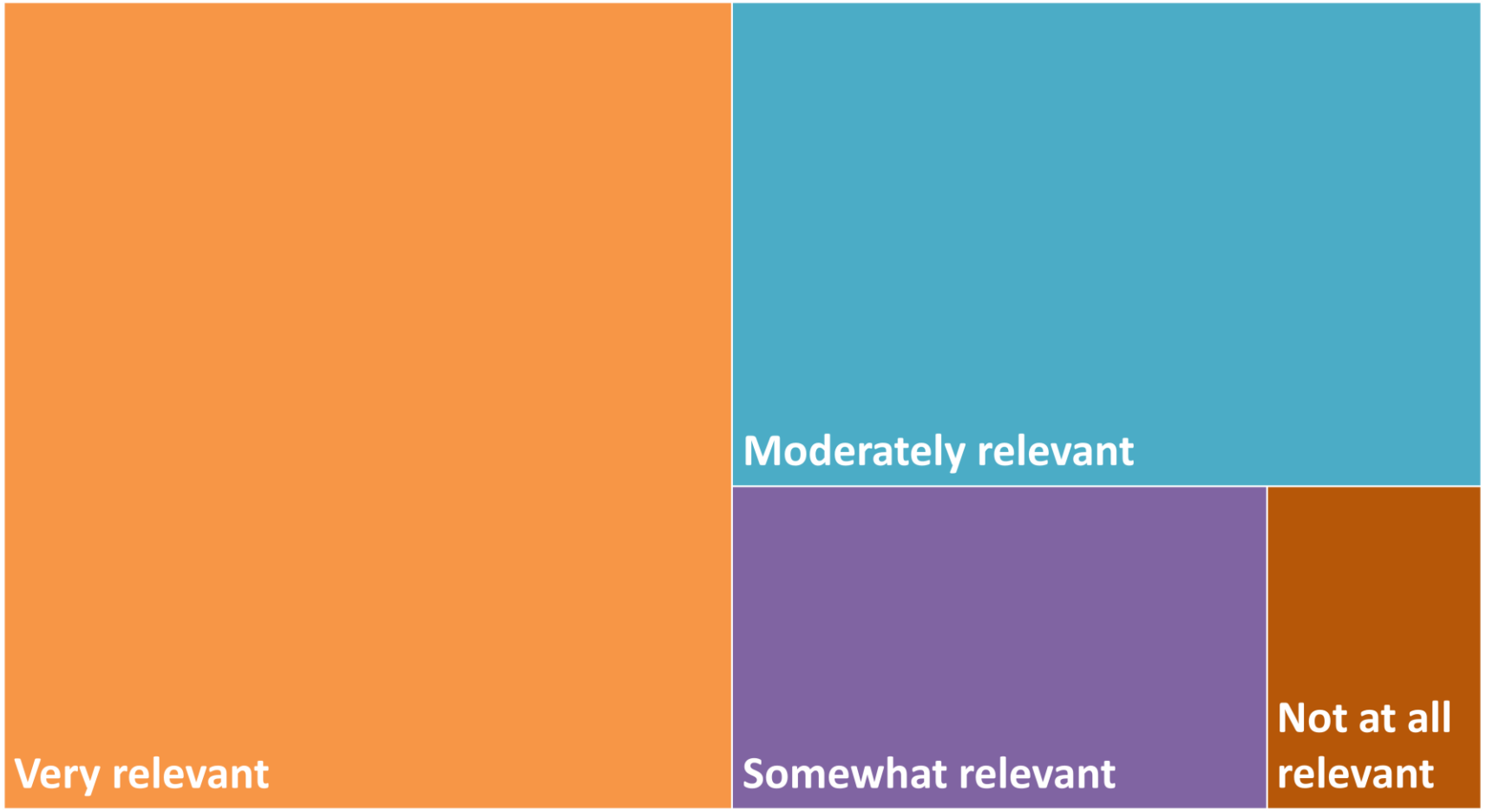
I attended

- I like interacting with HR staff in other schools and divisions
- The content was relevant
- I like to stay current & hear about updates
- I like to be able to ask questions

I didn't attend

- I didn't hear about it
- I was too busy to attend or had a conflict
- The location is challenging (parking, travel time)
- Another person in my unit goes & shares the information

Was the content relevant to what you do?



Suggested Topics for Future Meetings

Using ConnectCarolina More Efficiently

- Frequent issues we encounter
- Updates to the system (including upcoming org chart feature)
- Tips and tricks, avoiding errors, best practices from other ConnectCarolina users
- Understanding midstack errors
- Making corrections to entries
- When to submit a help ticket
- Examples of different ePARs and PAATs

Suggested Topics for Future Meetings

Working with Students

- Student actions: grant cycles vs. GSHIP cycle, external units hiring students but requiring us to process the actions
- Processes for working with graduate students
- Wage hour laws

Funding Actions

- Using combo codes
- How to make sure supplements are funded correctly
- Working with suspense

Suggested Topics for Future Meetings

Other Topics

- Processing workers comp and FMLA in the system
- Reports in InfoPorte
- What are job end dates used for (since they don't automatically end a job)
- Working with affiliates
- Carolina Service
- Process for exception sheets, overpayments, underpayments, including correcting student hours that were charged to the wrong position

What We Can Do to Improve

- Presenters, repeat the questions!
- Start resolving technical issues earlier so we can start on time.
- Show contact information for presenters.
- Send everyone who received this email the HR updates that are sent to HR Representatives.
- Send slides before the meeting so those on the webinar can follow along if there are technical difficulties.

What We Can Do to Improve

- Have more food

Some Reminders

- Share the word: The meetings are available “streaming” and as recordings on ccinfo.unc.edu
- Class on InfoPorte reporting — offered once a month

Student and Temporary "Autoterm" Reminders

Dave Turner

Sr. HR Business Analyst

New Auto-Termination Process

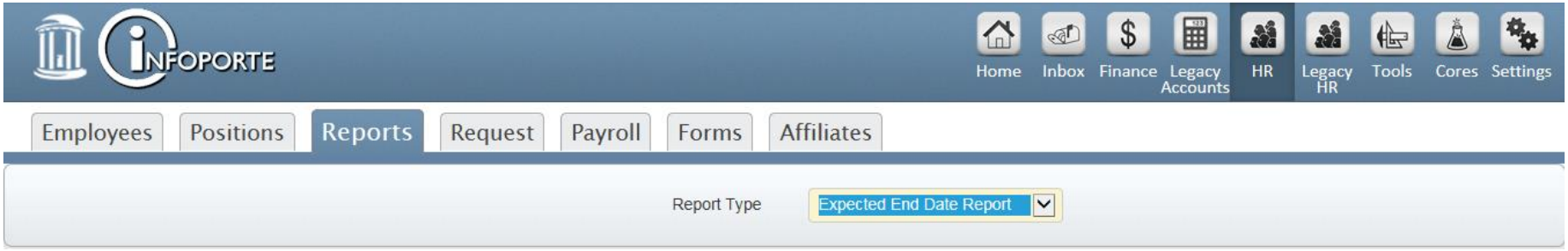
- The new process began in January.

- Every morning prior to office hours, we will automatically terminate any SHRA Temporary or Student with an Expected Job End Date equal to or before the current date.
  - Does not autoterm any employee with a Hire, Job Change, or Status Change action in progress or in Payroll lockout.

- On the 15th of every month prior to office hours, we automatically terminate any EHRA Student with an Expected Job End Date in or before the current month.
  - Does not autoterm any employee with a Hire, Job Change, or Status Change action in progress or in Payroll lockout.
  - Does not autoterm Fellow Trainees (Jobcode 800171)

New Auto-Termination Process

- To review your employees and their Expected End Dates, use Infoporte's Expected End Date Report.



Direct Navigation

Ann Sager

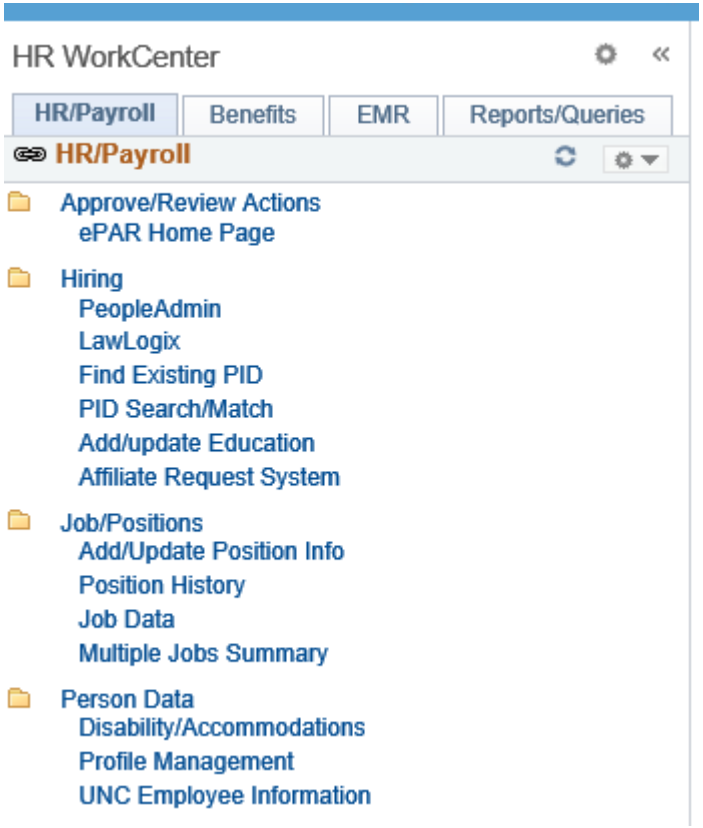
Sr. HR Business Analyst

Direct Navigation

DID YOU KNOW?

There are two different ways to navigate through ConnectCarolina

1) HR Workcenter



Direct Navigation

- Advantages
  - Navigation is easy (you do not need to know how to get to the page)
  - You can quickly jump from one page to another
- Disadvantages
  - You can only have one window open at a time
  - Cannot easily compare information from one page to another

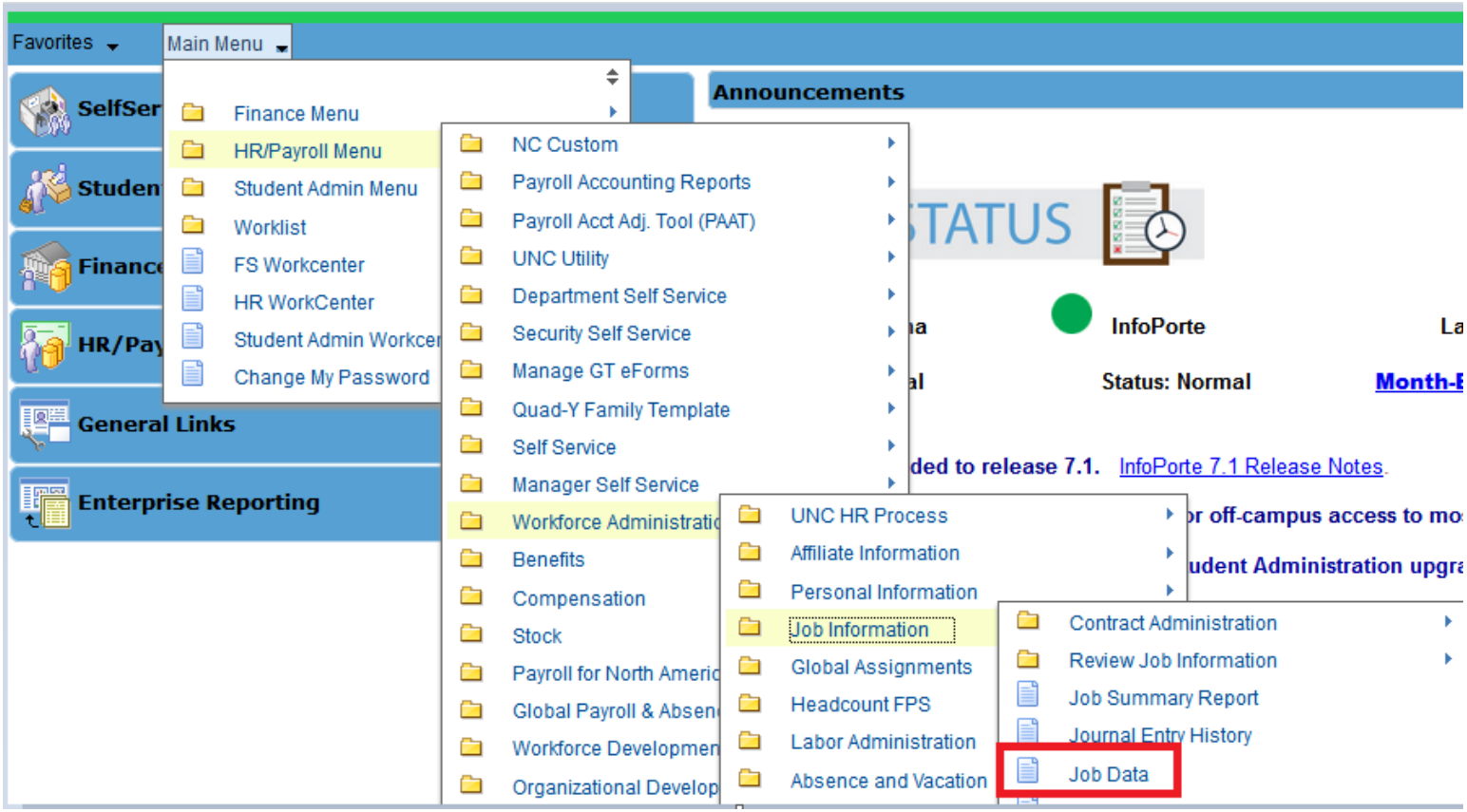
How many of you use the work-around of having ConnectCarolina open in two (or three) different browsers?

How many of you would like to see how I use navigation?

Direct Navigation

Let's say I want to look at a job record. I would navigate:

Main Menu>HR/Payroll Menu>Workforce Administration>Job Information>Job Data

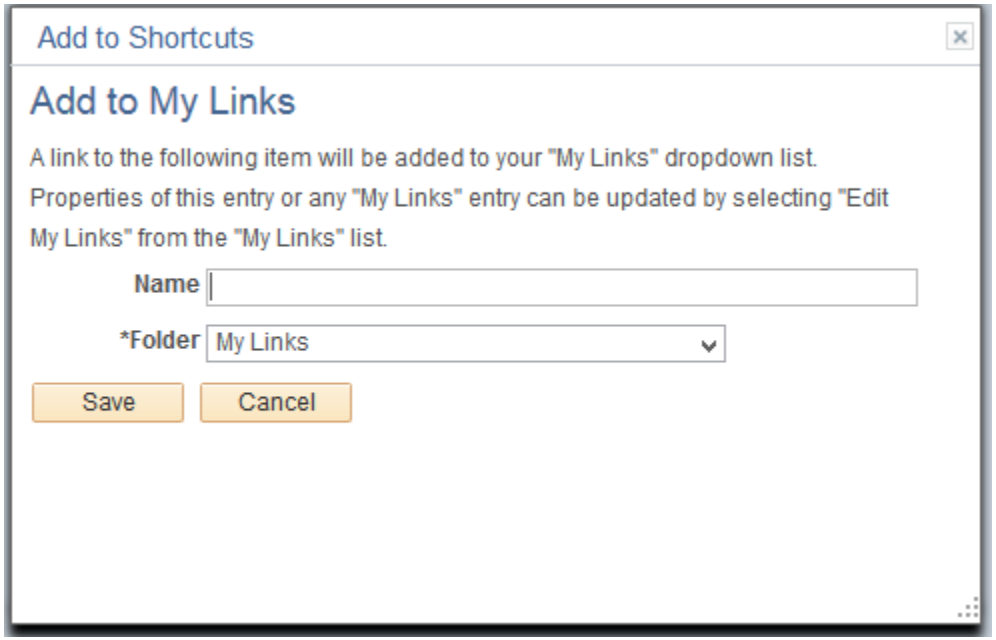


Direct Navigation

If I am going to use this navigation repeatedly, I would recommend adding it as a Favorite

1) In the portal banner (blue for Production), click the Add to Favorites link

2) Give it a Name
3) Save

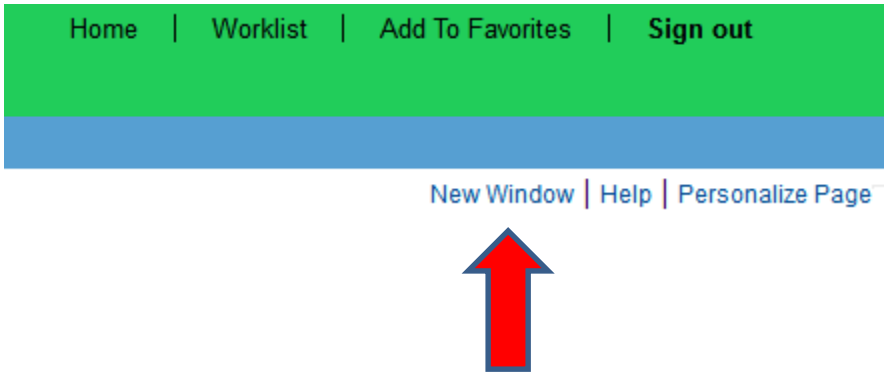


Direct Navigation

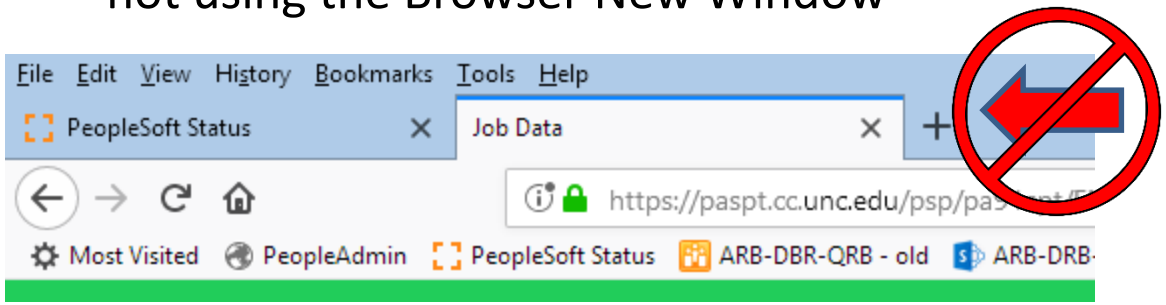
Now, let's say I want to look at the position data as well

Here comes the POWER of direct navigation!

Open a new ConnectCarolina window using the New Window link



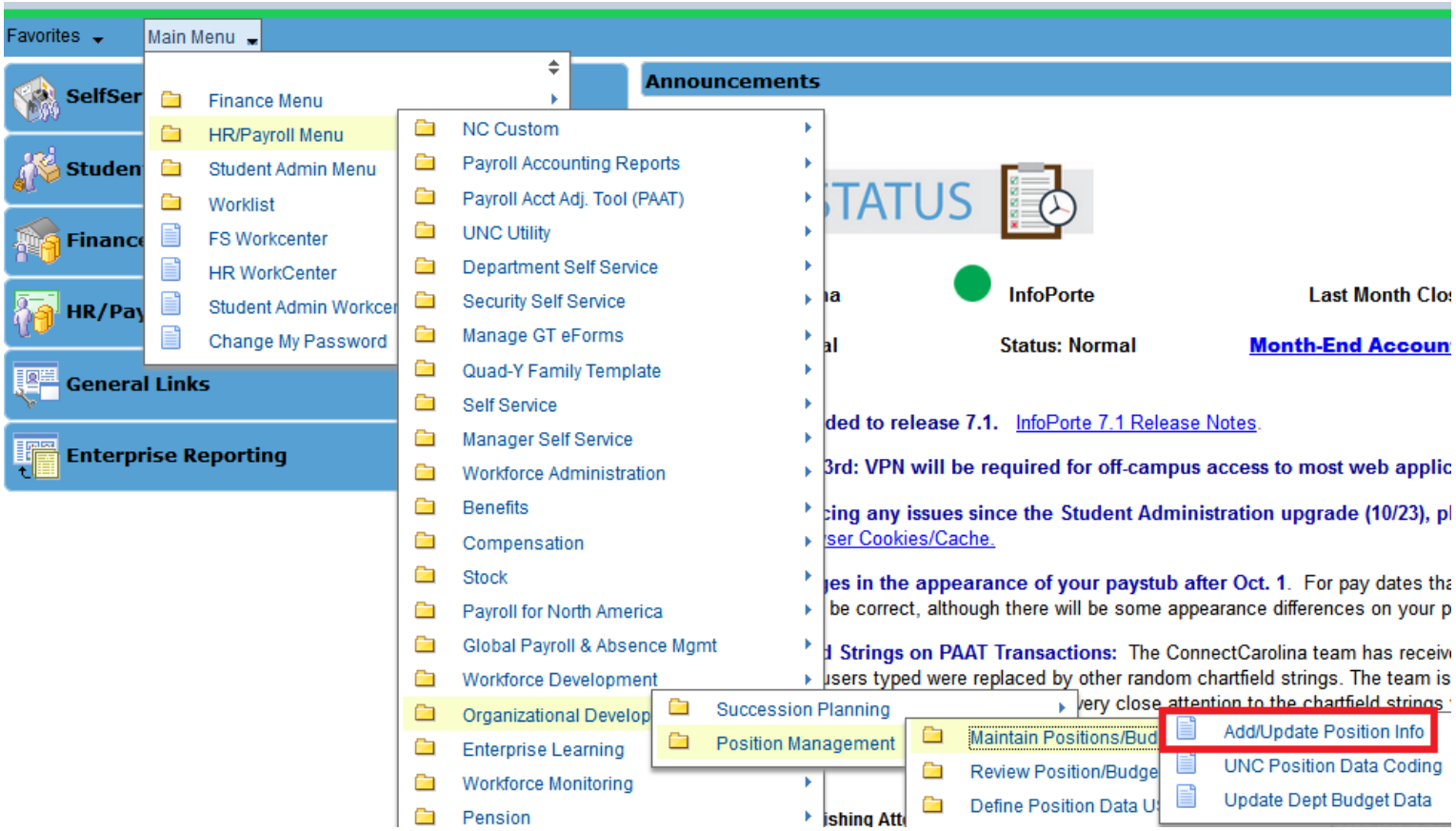
not using the Browser New Window



Note: This will clone the current window you have open

Direct Navigation

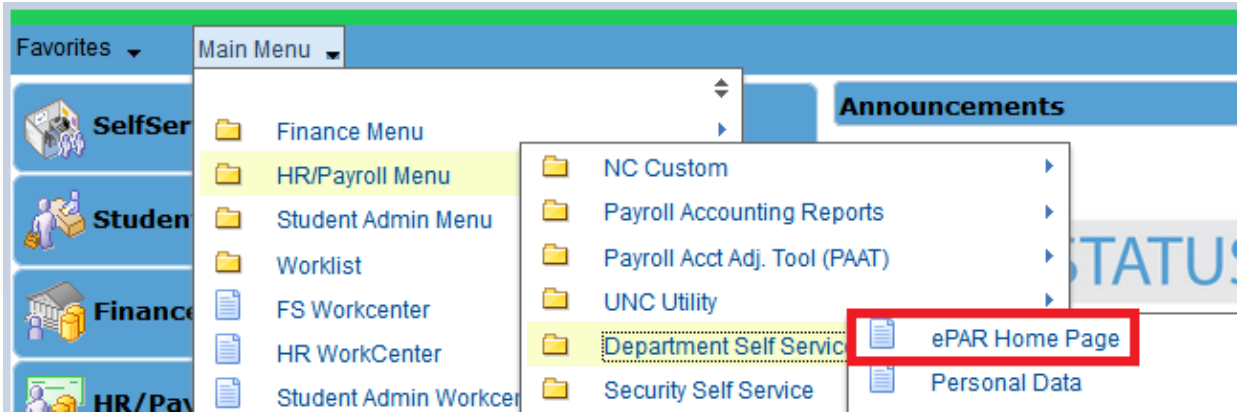
Main Menu>HR/Payroll Menu>Organizational Development>Position Management>Maintain Positions/Budgets>Add/Update Position Info

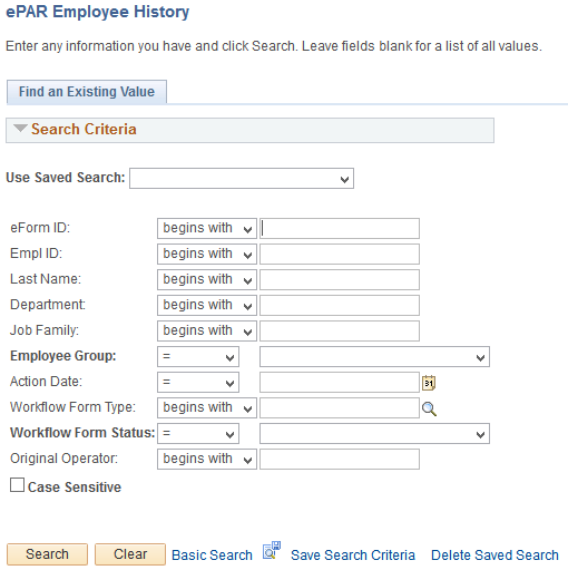


Direct Navigation

You can save this as a favorite too

One more…View an ePAR – Main Menu>HR/Payroll Menu>Department Self Service>ePAR Home Page





Direct Navigation

Again, save it as a favorite.

This is what I do every morning.

1) Log into ConnectCarolina
2) Pick (from my favorites) the JOB option
3) Click the New Window
4) Pick (from my favorites) the POSITION option
5) Click the New Window
6) Pick (from my favorites) the View an ePar option

You can have up to 5 windows (they must be UNIQUE) open

If you are using Infoporte, it works best if it is the last window (and it cannot be a favorite)

NOTE: You cannot mix Workcenter with Direct Navigation – you must choose one OR the other at a time

Direct Navigation

Additional Navigations:

Find Existing PID (for bio-demo changes):

Main Menu>Student Admin Menu>Workforce Administration>

Personal Information>Find Existing PID

Multiple Job Summary

Main Menu>HR/Payroll Menu>Workforce Administration>Job Information>Review Job Information>UNC Multiple Jobs Summary

UNC Employee Information

Main Menu> HR/Payroll Menu>Workforce Administration>Job Information>Review Job Information>UNC Employee Information

Position History

Main Menu> HR/Payroll Menu>Organizational Development>Position Management>Review Position/Budget Info>Position History

Need more: send me an email and I'll provide

Demo?

Questions?

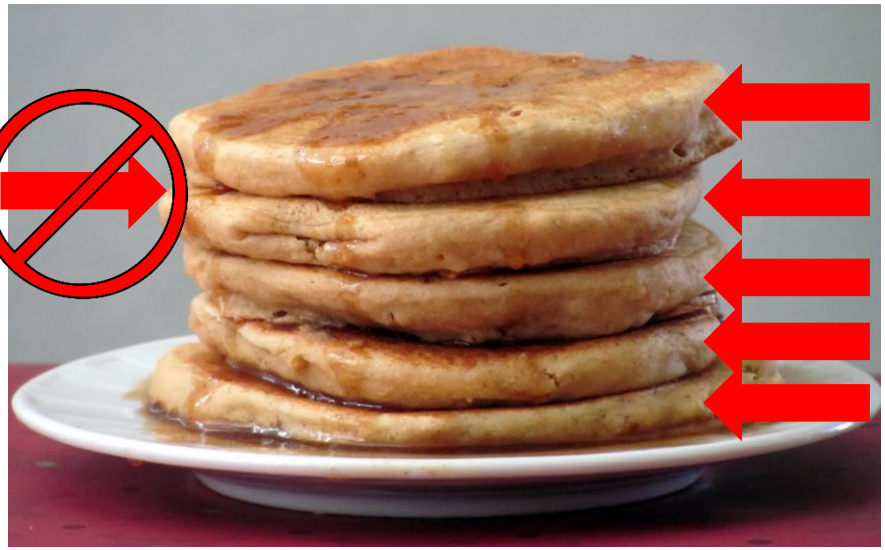
Midstacks

Ann Sager

Sr. HR Business Analyst

Midstacks

ConnectCarolina is a transactional system and each transaction becomes a row in the database. For example: think of a stack of pancakes:



TIM Admin change eff 12/1/2017

Pay rate change eff 7/1/2017

Supervisor change eff 5/1/2017

Department change eff 4/1/2017

Hire action eff 1/1/2017

You find out that there should have been a Leave of Absence transaction eff 11/1/2017

The system always puts things on the TOP. But this needs to fit in the middle of the stack (mid-stack).

It gets stuck!

Must be manually entered by BAs

Mid-stacks continued

- Scenario: Student is placed on SWB and then needs a supervisor change
  - Use the date the supervisor change occurred or the date student went on Short Work Break, whichever is later
  - May also wait for Return from Work Break / Reappointment

- Expected End Date Change
  - Do not need to go back to initial hire date

- Prevent mid-stacks by:
  - Avoid future dated actions, when possible
  - Submit actions in a timely manner

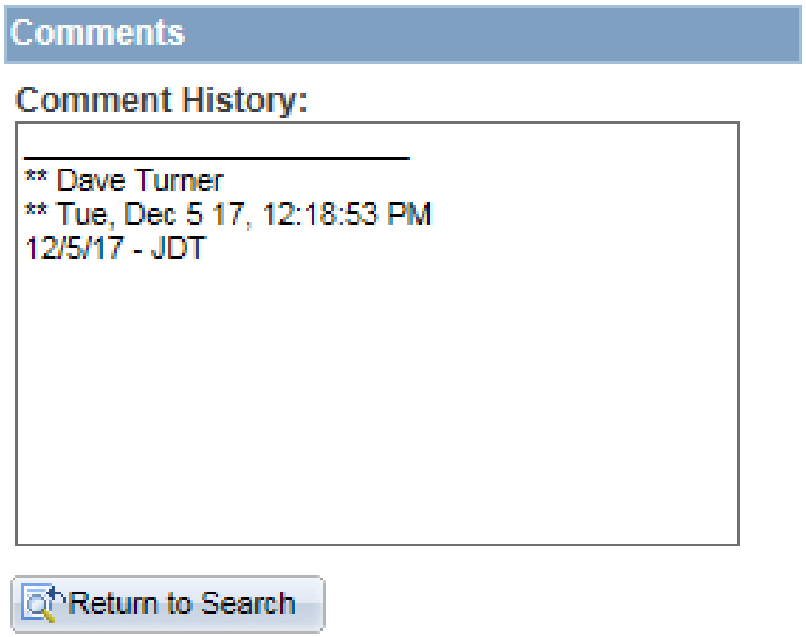
Comments in ePARs

Dave Turner

Sr. HR Business Analyst

Comments on ePARs

During training, we recommend that the Originator or Approver leave their initials and the date in the Comments section.



Comments on ePARs – What to Say

- Hire Form
  - "New Temp Hire needed for Holiday Sales Cashier, 11/1/17-12/15/17, at $10.00 per hour."
  - "Employee will be appointed into a non salaried lecturer position effective 1/1/2018 through 7/1/2018. Based on departmental needs she may be transferred into a compensated role for the fall of 2018."
- Position Form
  - "New student position for Dr. Richards."
  - "Requesting a reclassification so that the job duties are in alignment with the job title and to help with the recruitment of our Day Care Teachers."

Comments on ePARs – What to Say

- Fund Swap Form
  - "Moving all compensation to State Funds."
  - "Correcting Chartfield due to changing Grant funding."
  - Adjusted salary & Chartfield strings 5555555 and 5555556 for new budget year.
- Job Change Form
  - "This action is to correct the Job Code that was incorrectly entered on the original Hire form (ePAR 1234560)."
  - "I am recycling this action because the incorrect Job Code was entered for this action. Please use Job Code 22222."

Comments on ePARs – What Not to Say

- Job Change Form
  - "Data correction because the Hire form originator did something stupid on ePAR 234567!"

- Status Change
  - "Termination - It's about time."

  - "Jack was stealing funds from our department and got caught, so he is being fired."

9.2 Upgrade Update

Megan Keefe

HR Business Systems Manager

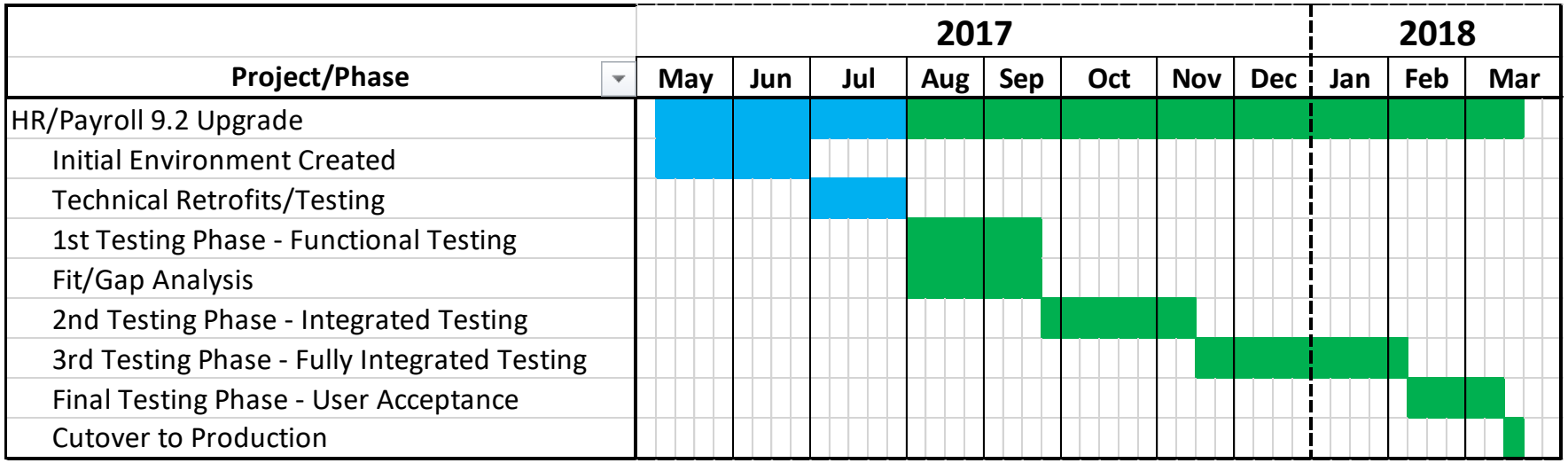
Why Are We Upgrading The System?

The software upgrade will enable ConnectCarolina to **take advantage of new software features in the future**. For example, one of the changes we expect to implement in 2018 is a new look and feel that is simple to use, reduces clicks and translates to any mobile device.

The upgrades ensures UNC will be able to **receive continuing vendor support** for ConnectCarolina.

The updates reduce **accessibility barriers** that make it difficult for many people with disabilities to use ConnectCarolina.

HR/Payroll 9.2 Project Schedule - Planned



HR/Payroll 9.2 Project Schedule - Actual

- UAT with Central Offices – January/February
- UAT with Campus Users – February
  - Let your School/Division HR Officer know if you are interested in participating

- Go-Live weekend March 2nd – 4th, 2018
  - Full ConnectCarolina outage (HR/Payroll, Campus & Finance)
  - Project team will work around the clock to minimize impact on working hours for campus users

HR/Payroll 9.2 Project Preparing for Go-Live

- Project team has done extensive testing throughout the system in multiple environments including;
  - Interfaces and data feeds other systems/vendors (Benefit Focus, LawLogix, PeopleAdmin, ORBIT, etc…)
  - Reviewing and evaluating core system configuration for upgrade impacts
  - Evaluating pages used by campus users including lookups across multiple browsers
- Preparing and rehearsing step by step ‘cutover’ schedule to ensure that go-live weekend goes smoothly and that everything is up and running on Monday morning

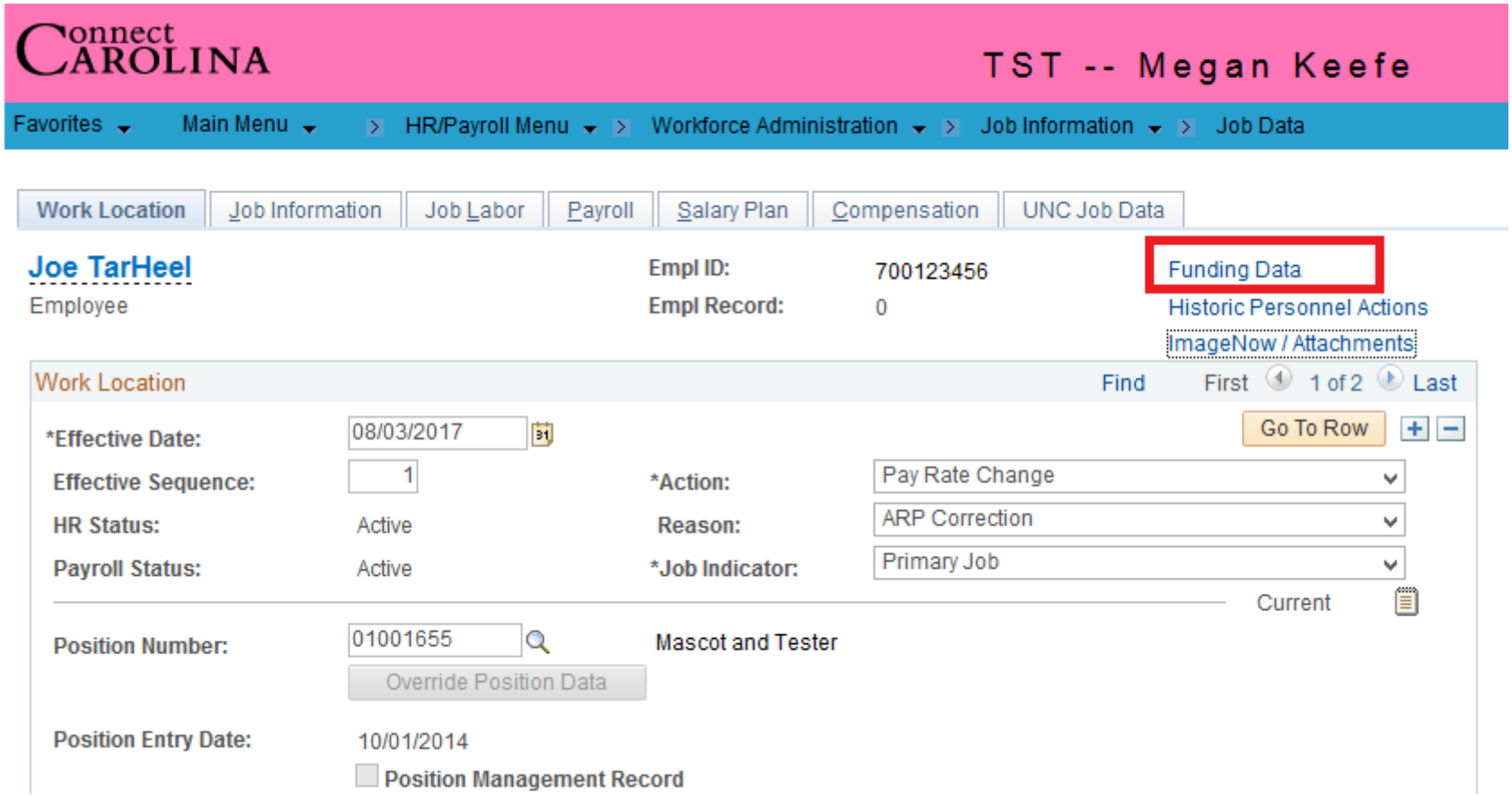
HR/Payroll 9.2 Approved Activities

- Provide funding information via related content on job and position data pages (status: Job Data - in testing; Position Data,- in development)
- Revisit / remove Budget Workflow (status: in testing)
- Address Affiliate ePar bugs (completed ahead of 9.2)
- Modify field labels on UNC Position Data page (9.2 work complete)
- (Under consideration) Org chart functionality (status: in testing); Initial release will most likely limited to Central Office staff and HR Reps

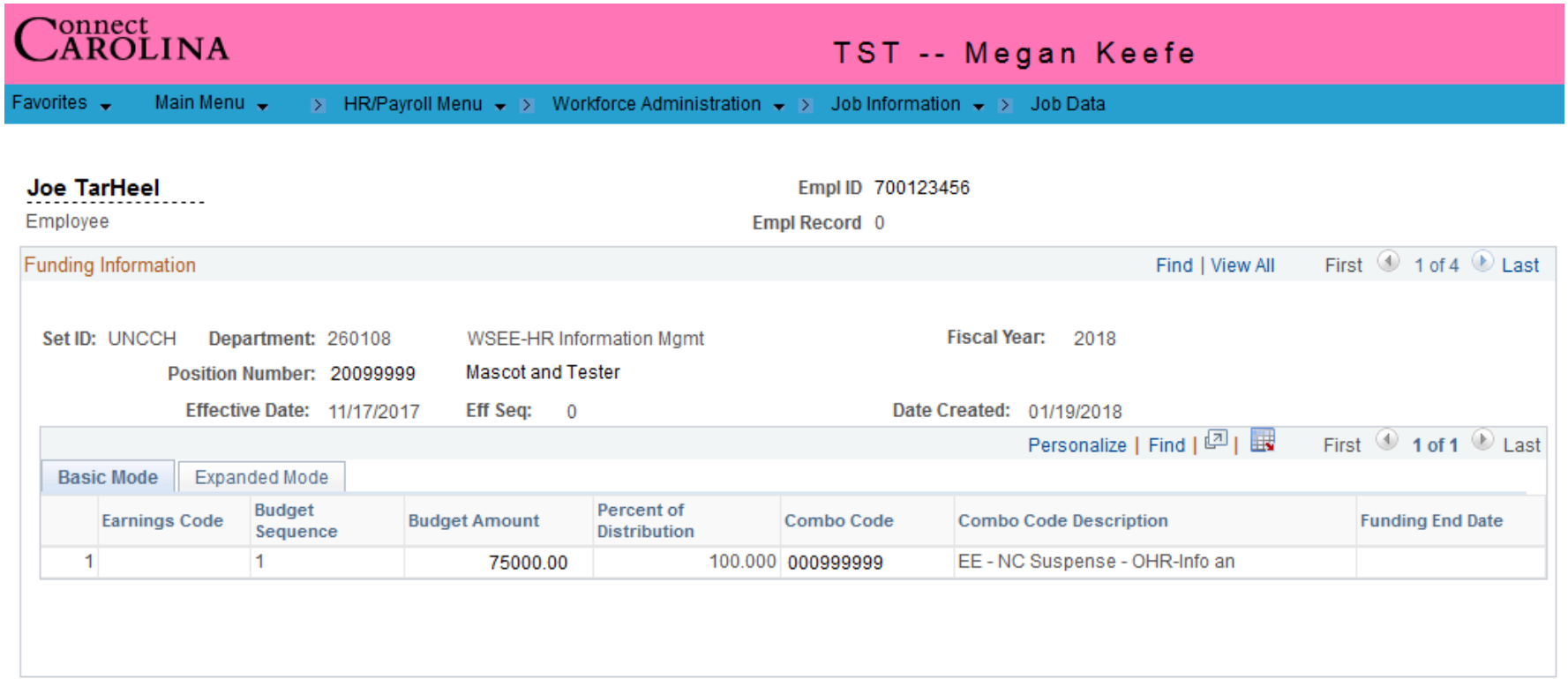
Approved Activities - contingency

- At risk items will be worked as a top priority after the 9.2 go-live
  - Remove Budget Workflow
  - Implement Org Chart functionality

Draft – funding on Job Data



Draft – funding on Job Data



Maximizing ePAR Search

Corrie Mimms

Sr. HR Business Analyst

Maximizing ePAR Search

- Tools to help you filter search results for View an ePAR
  - Searching with multiple Workflow Status values at one time using 'In'
  - Searching by a range of Effective Dates (Action Date field on Search)
  - Using a wildcard (%) to search by a range of department numbers
  - Combining multiple search criteria to maximize search capabilities
- Tips for Searching for ePARs reference document
  - https://ccinfo.unc.edu/files/2016/01/Tips-for-Searching-for-ePARs1.pdf

ePAR Workflow Statuses

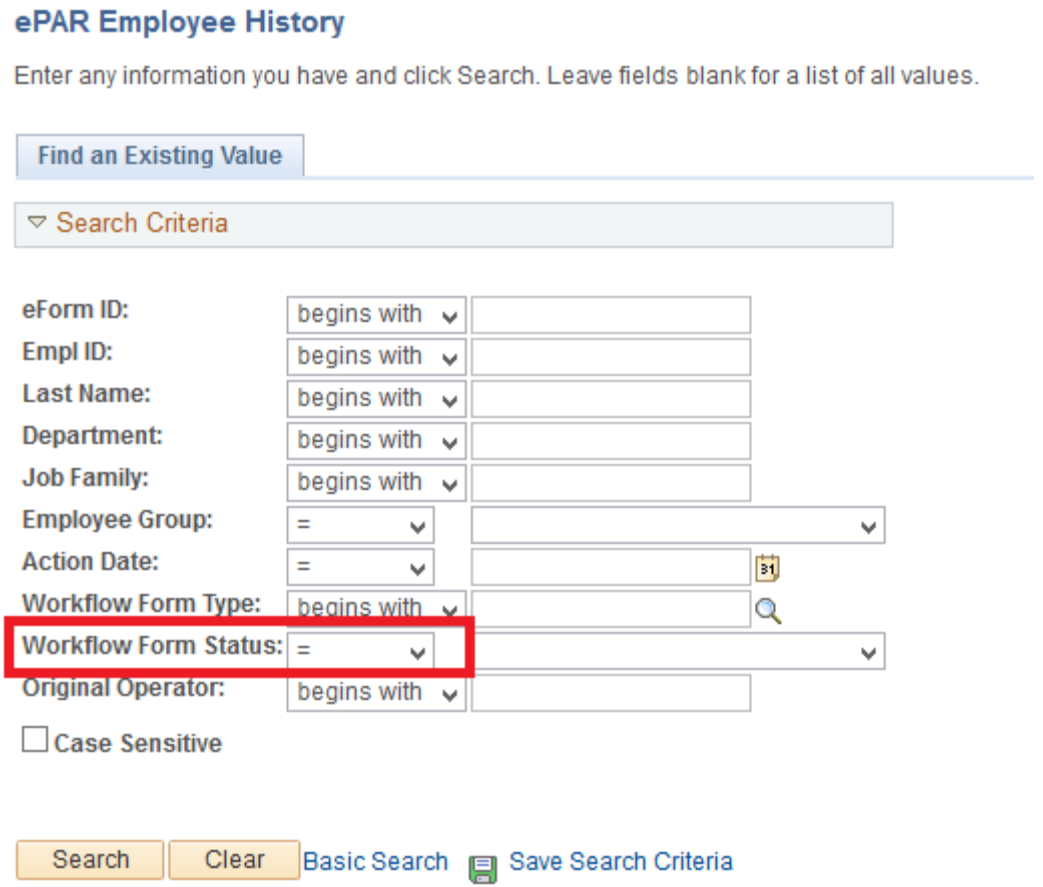
Status	Description
Pending	Submitted but with no approvals yet
Part Apprv	Partially Approved
Withdrawn	Withdrawn by Originator or Workflow Administrator (Help Desk/Business Analysts)
On Hold	On Hold by originator
Denied	Denied in Approval Process (removed from workflow, not recycled to originator)
Authorized	Fully approved, but is stuck at Integration Broker
Executed	Has gone through the Integration Broker and updated in ConnectCarolina
Recycled	An approver has sent back to originator for updates

Originator will receive a notification email

Maximizing ePAR Search

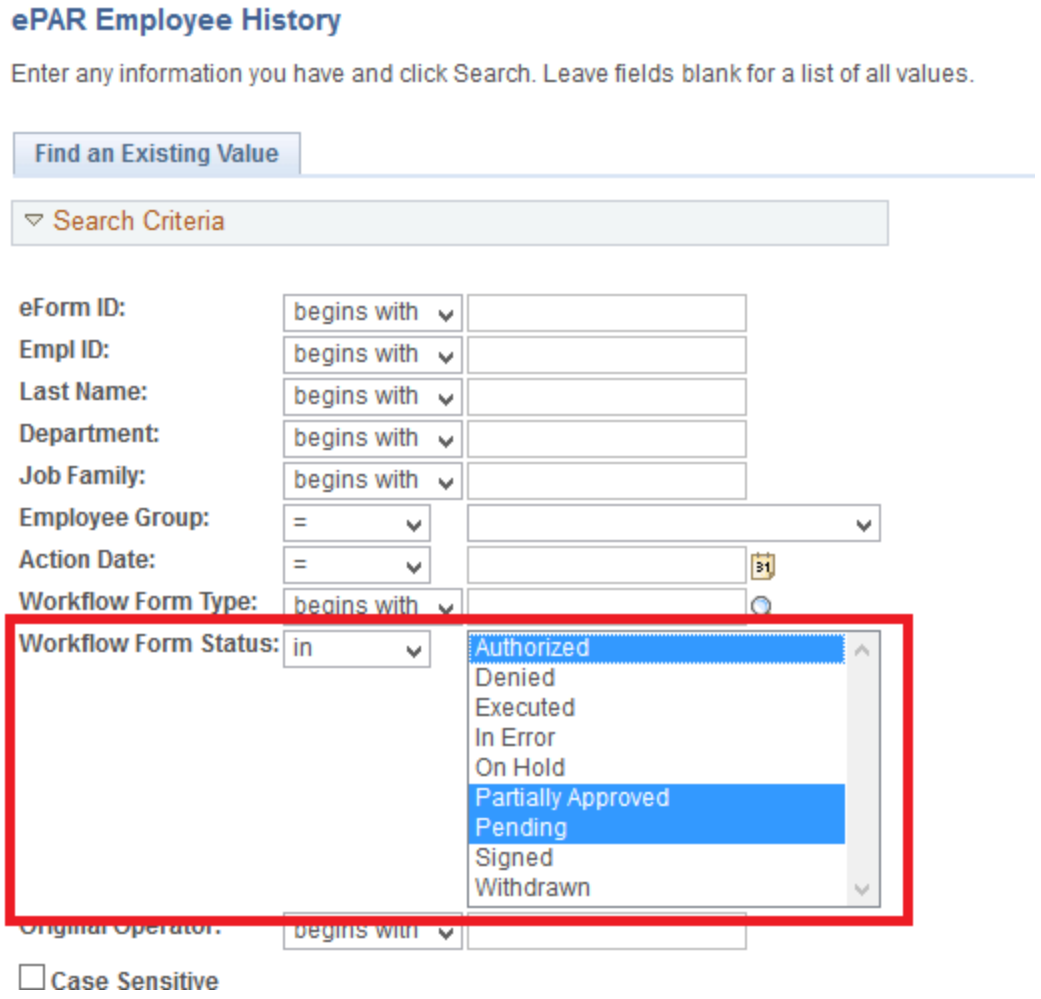
Searching with multiple workflow statuses at the same time

Change the Workflow Form Status default from '='



Maximizing ePAR Search

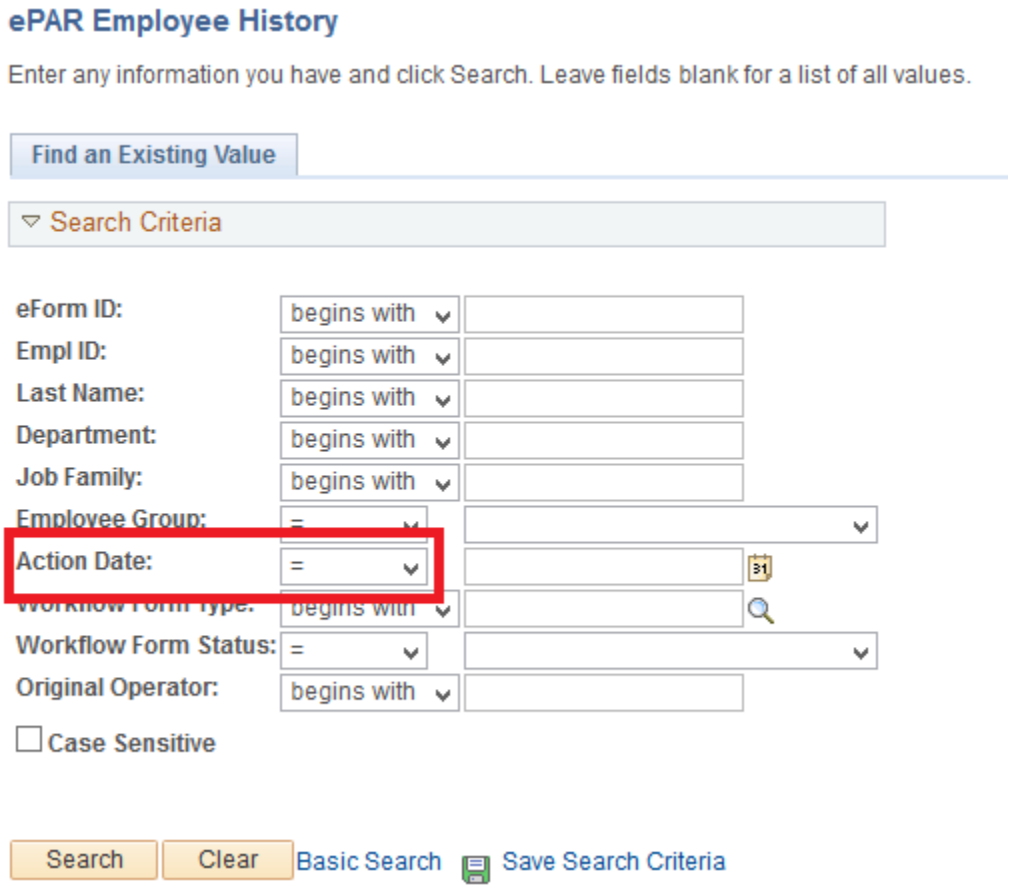
Change the Workflow Form Status default to ‘in’, then use the control key (Ctrl) to make multiple selections from the Workflow Form Status dropdown



Maximizing ePAR Search

Searching by effective date (Action Date) using a date range

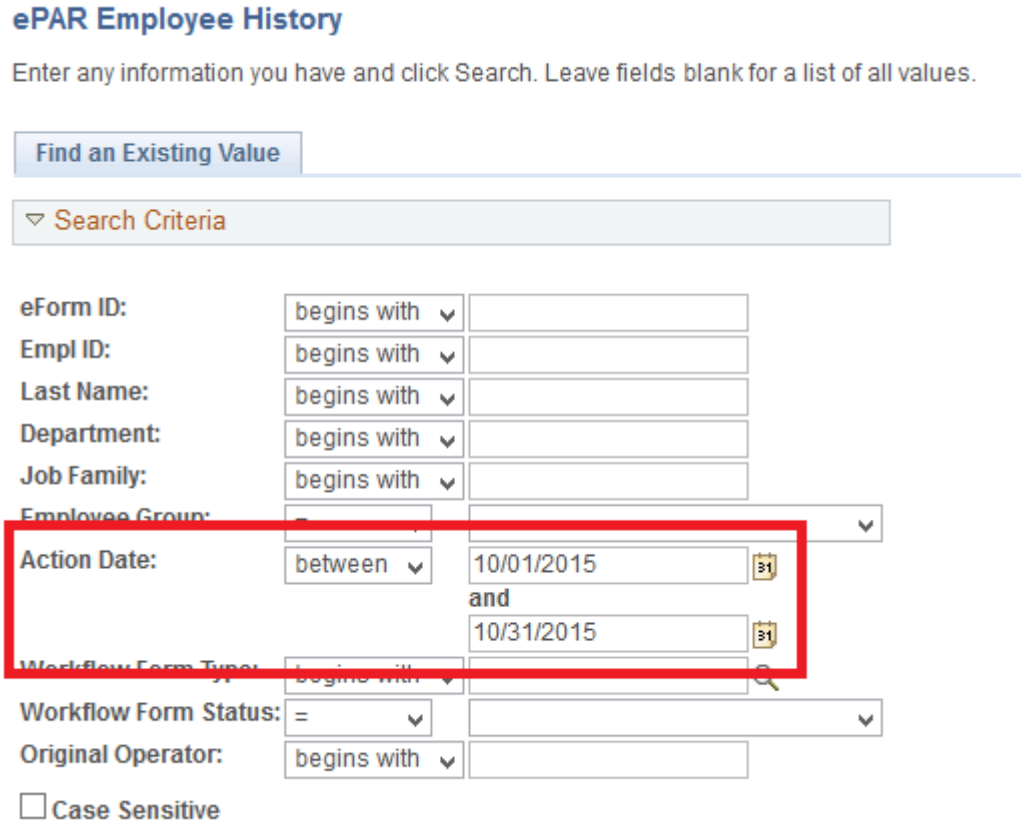
Change the Action Date default from '='



Maximizing ePAR Search

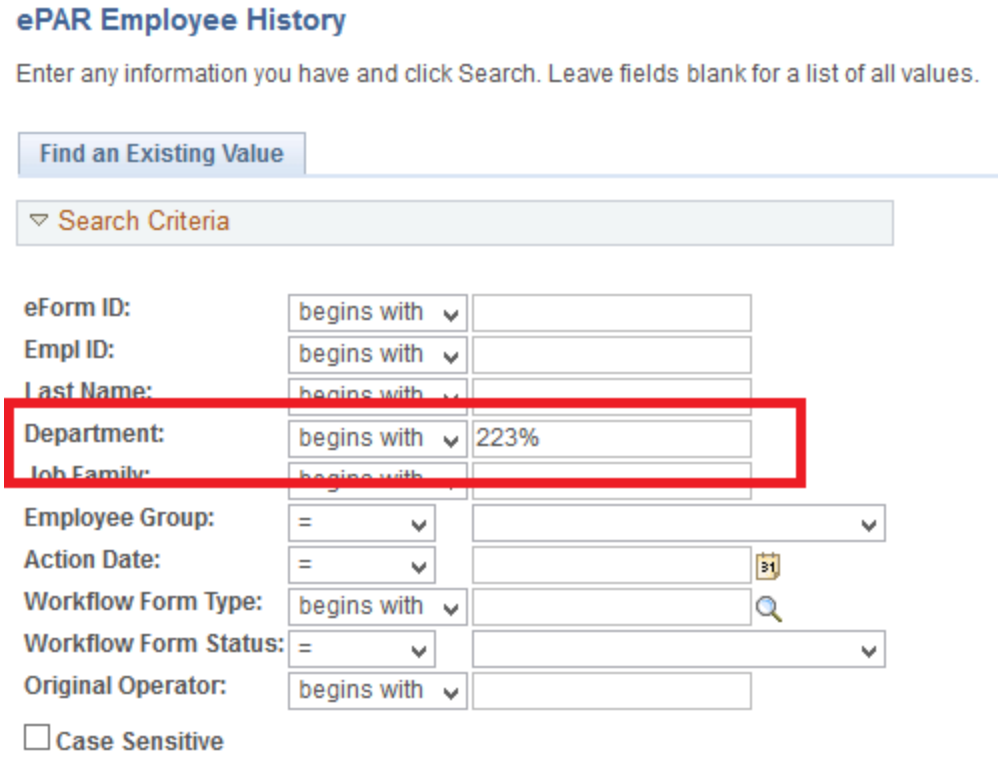
Searching by effective date (Action Date) using a date range

Change the Action Date default to 'Between' then enter your date range



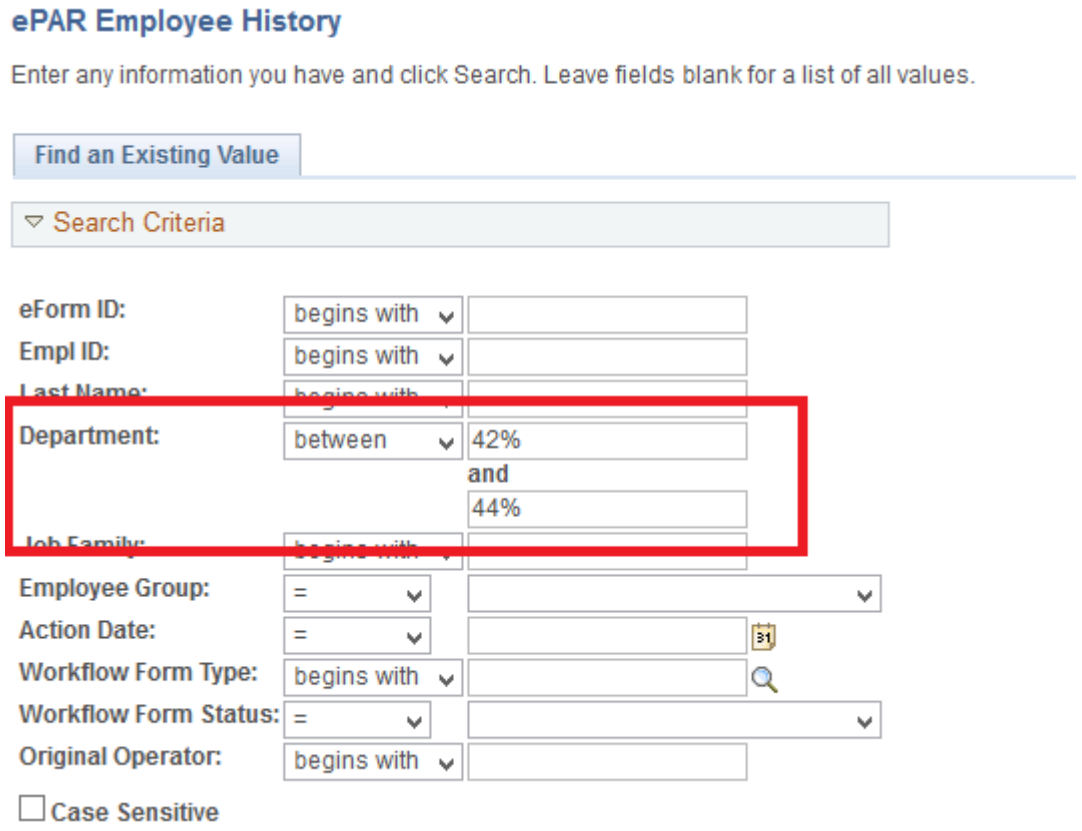
Maximizing ePAR Search

Use ‘Begins with’ plus a wildcard (%) on the Department field to search by a range of department numbers



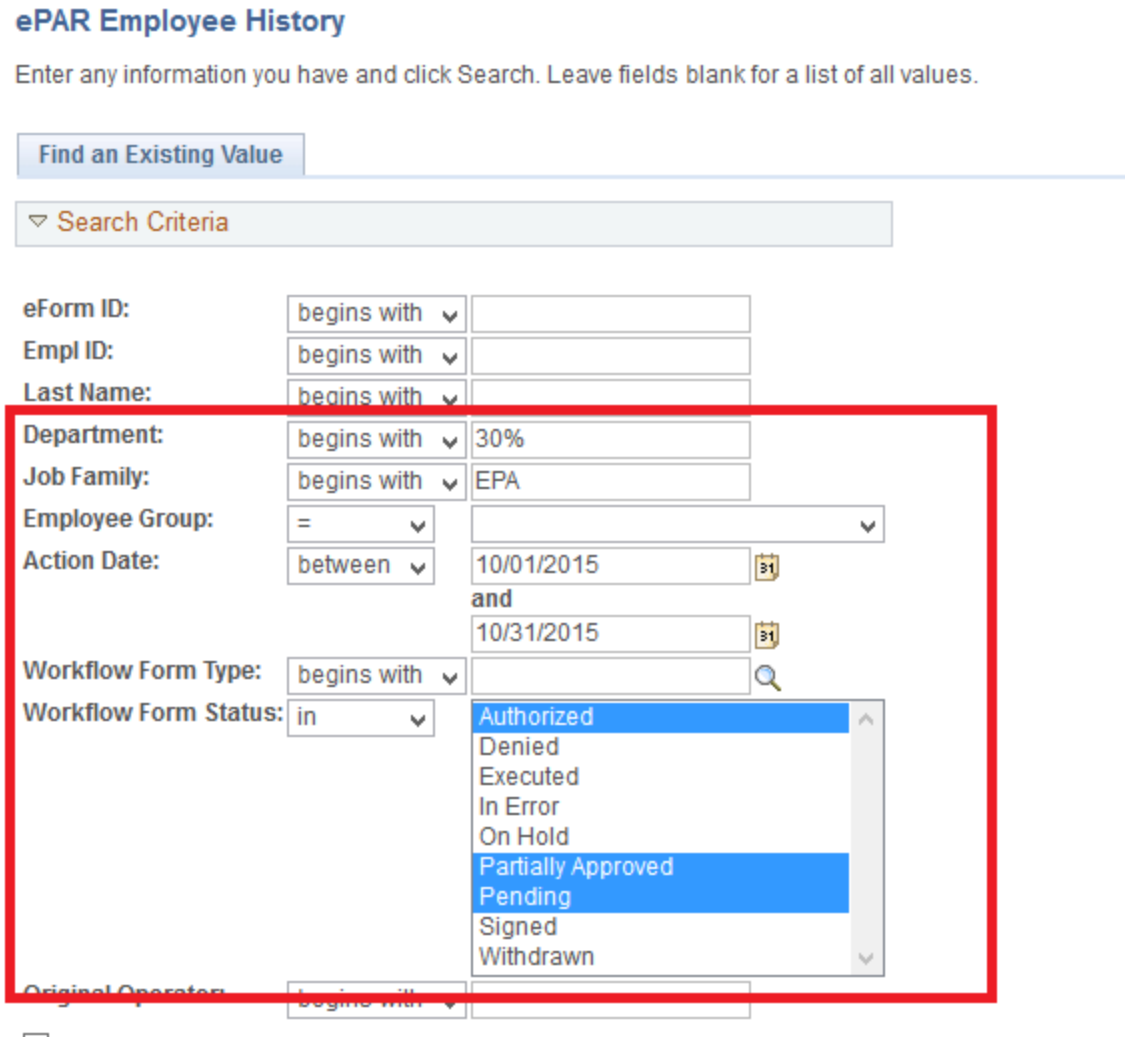
Maximizing ePAR Search

Use ‘Between’ plus two wildcards (%) on the Department field search by a large range of department numbers



Maximizing ePAR Search

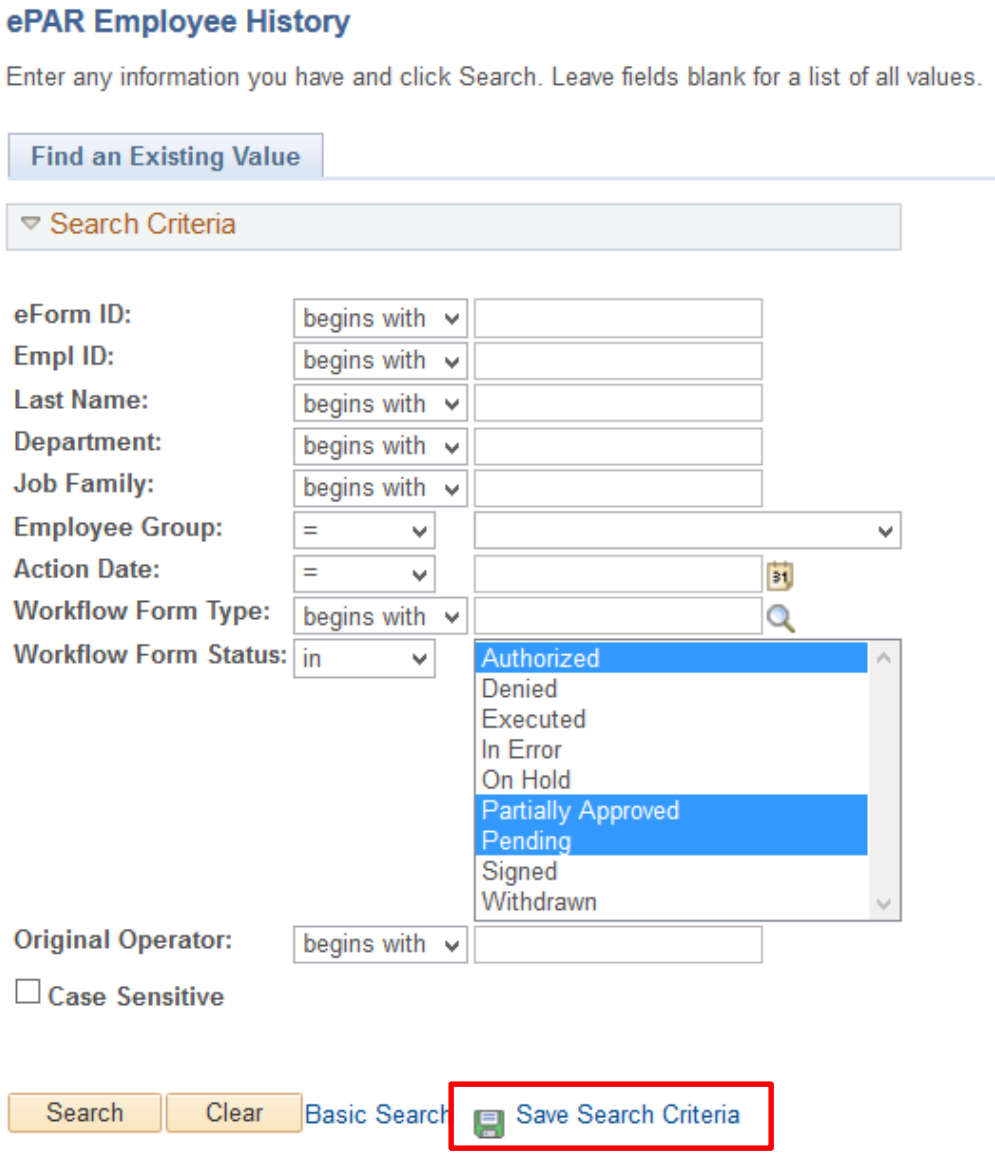
Combine multiple search criteria to maximize search capabilities.



Saving an ePAR Search

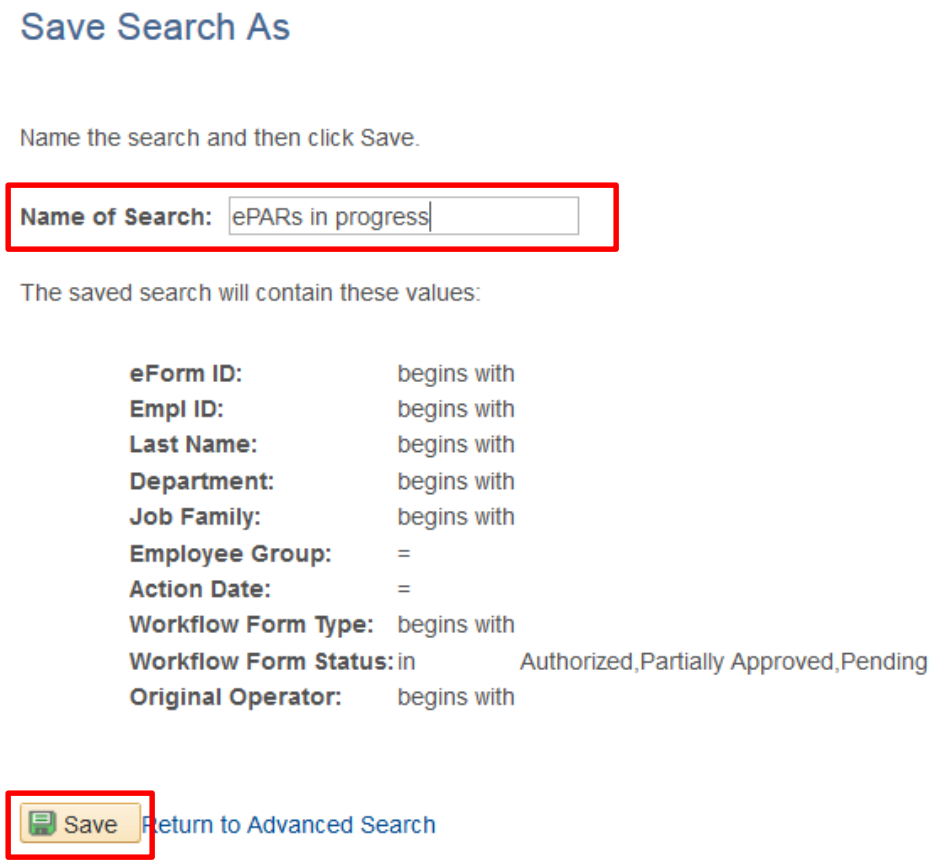
Do you have a search you use regularly?

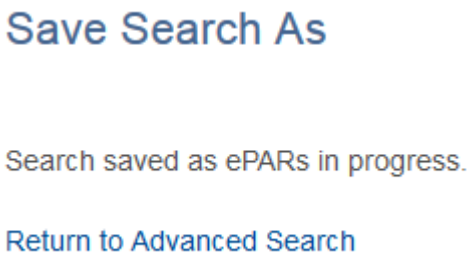
Save it!



Saving an ePAR Search

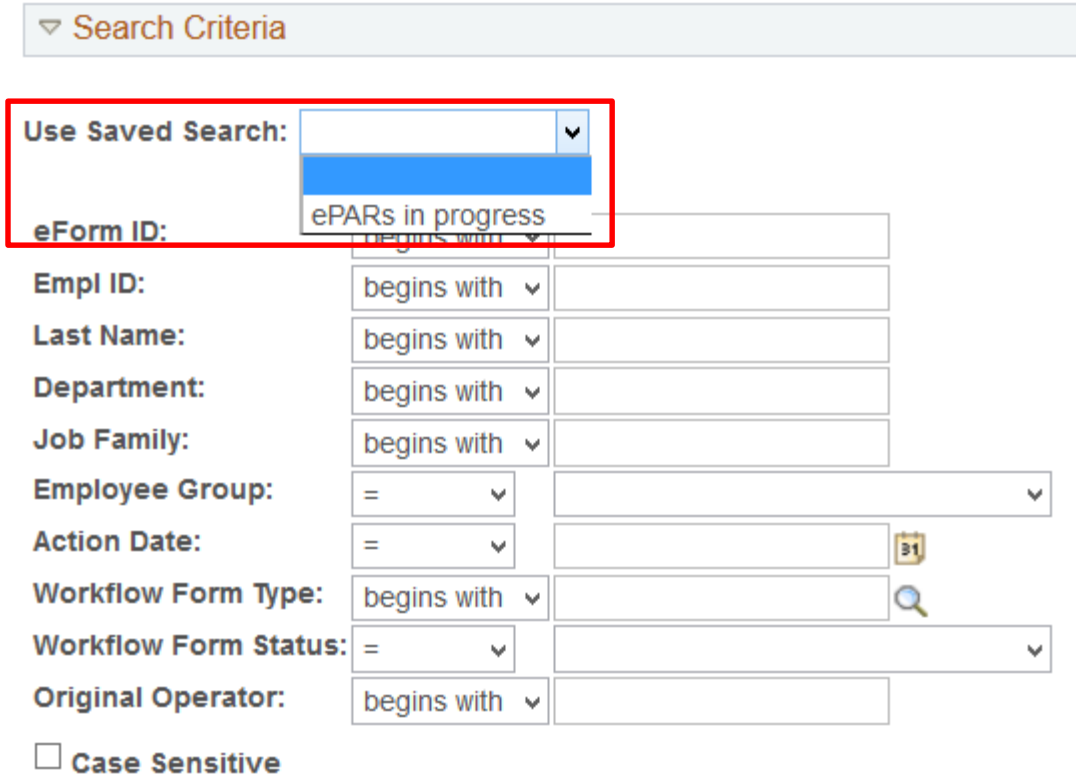
Name the search and click Save.





Saving an ePAR Search

Saved Searches appear in the Use Saved Search drop down.



Questions?