

Connect CAROLINA

and other
Administrative Systems

Academic Year Report 2018-2019

Supporting our Tar Heel Student-Athletes

In 2018-2019, UNC fielded 28 varsity athletic teams comprised of nearly 800 student-athletes. Of those, 391 were named to the 2017-2018 ACC Honor Roll and during the same year, 40 of those student-athletes earned a perfect 4.0 GPA in either the fall or spring semester (or both). These are examples of the information the Academic Support Program for Student Athletes (ASPSA) reports on regularly throughout the academic year. The Enterprise Applications team helped convert the academic reports used by ASPSA from an old database to the new system to help ASPSA track this academic progress of our student-athletes. To date, we've created 31 reports for ASPSA that they use to support student-athletes and track their progress.

ASPSA isn't the only office on campus that needs to be able to access information about our student-athletes' academic progress. The Office of the University Registrar needs access to information to report eligibility to the NCAA – they can now do so electronically within ConnectCarolina instead of using paper documentation because of the work of the Enterprise Applications team. These "point-and-click" reports allow staff to access the information they need with just a few clicks.

Operational Excellence: Hiring Early Impact Work

UNC's Operational Excellence initiative was launched by the Provost and Executive Vice Chancellor's Office in Fall 2018. For more information on the Operational Excellence project, visit <https://operationalexcellence.unc.edu/>.

Streamlining the hiring process was one of the first processes the Operational Excellence project selected for analysis and improvement. ConnectCarolina's Human Resources Information Management (HRIM) team provided data and subject matter expertise to support the Hiring Early Impact Project's work. HRIM's data analysts helped to identify opportunities for efficiency improvements and informed the design of a hiring dashboard to be used by hiring managers, senior leaders, HR Representatives, and OHR to track the status of the recruitment and hiring of both SHRA and EHRA Non-Faculty permanent employees.

Creation of the hiring dashboard initially involved a very manual process to pull the information needed to build dashboards for each of the pilot groups, the Gillings

While better reporting helps guide coaches and staff when it comes to supporting student-athletes, that's only one piece of the puzzle. To facilitate communication, Athletics has started to utilize Teamworks, a third-party application. This year, Teamworks was integrated with ConnectCarolina to pull information, such as class schedules, directly from the system. Coaches are now able to see all of their players' schedules which is helpful when they're making practice schedules and team meetings.

This work allows staff to support our student-athletes so they're in top shape both on the field and in the classroom.



School of Public Health and the Vice Chancellor for Research. Rich Arnold, Senior Director on the HRIM team, met with the design team and members of the hiring "war rooms" over the course of several months to fine-tune the dashboard design to provide actionable information for pilot participants. Once the dashboard was finalized, he worked with the Enterprise Reporting and Departmental Systems team to move the dashboard into the Data Warehouse and automate some of the processes to pull the information onto the dashboard. Over the course of Spring 2019, additional UNC units were trained and began utilizing the new hiring framework and the hiring dashboard to reduce time to hire.

By the end of June 2019, two thirds of UNC units were employing the new processes and dashboard. "As of June 24, 2019, the University [these units] had hired 259 SHRA and EHRA-NF employees since the beginning of the Hiring Early Impact project. The time to hire these employees has been reduced by nearly 50% from an average of 82 days to 42 days," according to Rick Wernoski's June 28th Weekly Update on the Operational Excellence website.

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Finance Joins HR and Student Administration With Upgrade

ConnectCarolina is the system of record for all financial transactions at the University, so when the Finance component was upgraded to the latest version of the software behind ConnectCarolina, it affected 4,500 employees who create millions of financial transactions in ConnectCarolina each year.

Software upgrades aren't glamorous but they're necessary. If you're saying to yourself, "I thought we did this last year," you're not wrong. In fact, the Finance software upgrade in December 2018 followed the ConnectCarolina Student Administration and Human Resources upgrades in fall 2017 and spring 2018. With the Finance upgrade we had the last "brick" in the software infrastructure needed for ConnectCarolina to take advantage of new software functionality that, among other things, allowed us to implement important security updates and a layout that is more accessible to many people with disabilities.



ConnectCarolina Gets a New Look

When everyone logged in to ConnectCarolina on May 20, 2019, they found new home pages with the same type of tiles they see on their smartphones and tablets. They also found they had new ways to get around in the system. Even the log in page was new. The change to ConnectCarolina, dubbed the ConnectCarolina Makeover, was the culmination of months of work by the ConnectCarolina team to upgrade to the newest version of the software behind ConnectCarolina. The highly visible payoff to campus was a more user-friendly ConnectCarolina.

A campus-wide survey provided the ConnectCarolina team with input on design elements like screen layout, colors and icons. The team also heard that campus users wanted navigating in ConnectCarolina to be easier and more intuitive. "Simplify the screens and make it easier for me to find what I'm looking for" was a common theme.

Armed with this input, the team created unique home pages fine-tuned to how students, employees, and administrative staff use ConnectCarolina. For example, all UNC-Chapel Hill employees have a Self-Service home page with easy-to-access information related to their employment. The **My Benefits** tile on the Self-Service home page shows a summary of the employee's health and retirement benefits selections and the **My Pay and Taxes** tile is a one-stop-shop for paystubs, direct deposit, and tax forms.

The work didn't stop once the new look went live in May. The team is continuing to solicit feedback from staff across campus and working to make the system even better for our campus community.

ROUTINE SYSTEM MAINTENANCE

Training

1,518

Individuals Trained

System

8,690,170

Logins to ConnectCarolina

665,863

Documents Added to Electronic File Management System

7,215

Application Access Requests Processed

Help and Service

29,092

Help and Service Requests Received

25,454

Help and Service Requests Resolved

915

Enhancements and Corrections Implemented

Better Reporting Options



Millions of transactions are entered into ConnectCarolina every year. Staff at the University use reports in InfoPorte to track those transactions and make decisions about how their departments operate. One of Enterprise Applications' focus areas during the year was to enhance existing reports and develop new reports and queries for campus and central offices. Staff who use InfoPorte to access finance, human resources, research, and student administration reports benefited from the enhanced reports. Among the improvements are the following:

- The finance and grants reports in InfoPorte now pull expense numbers from the actual expenses instead of from budgets. This helps staff in schools and division to track expenditures against the University's official financial records rather than interim records.
- We made some of the HR reports, such as the Expected End Date and Affiliates reports easier to use by improving how the filters work.
- Research reports, such as the OSR Invoice Listing Report and the OSR Payments Report, now pull their information from the same place as the other Finance SAS reports, eliminating possible inaccuracies.
- We created new pages in ConnectCarolina to see students eligible to participate in athletics and created new reports to make it easier to monitor eligibility.
- New queries were made available to help monitor sponsored research funds and identify future terminations.
- A new Query Dashboard in ConnectCarolina gives HR Representatives access to real-time data in one easy-to-access location.

Better reporting allows our campus and central office partners access to the information they need most when they need it.

Keeping the Oxygen Pumping

Mike Barker, interim Chief Information Officer, recently described ConnectCarolina "as the heart of the University's circulatory system, carrying the oxygen to all its extremities." A large portion of what the ConnectCarolina team does each year is to maintain the health of the heart. During the last year, we've completed two major upgrades, one of which affected every person at the University. Added to those upgrades, we've kept that heart pumping by doing preventative care on the system and by adding features to keep it safe.

The preventative care that the system needs is carried out in multiple ways. Each year, we support many operational activities in support of UNC's Finance, Workforce Strategy, Equity and Engagement, Sponsored Research and Student Administrative activities. These include mandated updates like those for federal and state tax withholdings. Four times a year, we complete the Census, which is the State-required accounting of students enrolled at UNC in a given term. We make updates to feed the University's student and employee data to the UNC System Office in compliance with their requirements. We provide support for producing annual tax documents including W2s, 1098Ts, 1099s, and 1095Cs. And, we support the University's fiscal year end activities.



Keeping our students' and employees' information safe is one of our highest priorities. Over the last year, we tightened security in ConnectCarolina and its companion systems by limiting the number of places where sensitive information is available and reducing the number of people who have access to the information. We also strengthened security for UNC accounts by adding 2-Step Verification with Duo Security to additional systems including Surplus Property Management. We also made sure everyone with access to Bank of America Works, the tool for reconciling Purchasing Cards, has 2-Step Verification setup on their email accounts. These added layers of security reduce the number of places someone can attack our systems.

Much like maintaining the health of your heart is essential so that the oxygen makes it to all of your body's extremities, maintaining the safety and security of ConnectCarolina and its systems, and keeping them up to date, is crucial to the University's day-to-day operations.



Thanks to the ConnectCarolina team
and to all of our great partners for
helping make these things happen!"

STUDENT

Undergraduate
48,926
Applications Received
4,616
Degrees Awarded

Graduate and Professional
27,780
Applications Received
3,709
Degrees Awarded

Continuing Education
3,988
Students Taking Friday Center Online Courses
68,290
Hours of Continuing Education Completed
2,364
Graduate and Friday Center Continuing Education Participants

General
500,542
Total Course Enroll and Drop Actions Entered by Students
37,443
1098Ts Issued

FACULTY & EMPLOYEES

Compensation
435,413
Paychecks Issued
17,612
1095Cs Issued

HR Transactions
95,515
Electronic Personnel Action Requests (ePARs) Processed
21,671
Payroll Accounting Adjustments (PAATs) processed

General
31,378
W2s Issued
Training
71,932
Safety and Security Training Sessions Completed

FINANCE TRANSACTIONS

Journals
22,018,887
Journal Lines Processed
1,921
Customer Billing Management System Journals Totaling \$178.7 Million, Processed

Vouchers
400,730
Vouchers Submitted
31,985
Travel Reimbursements Processed
4,062
1099s Issued

Orders and Purchasing
112,983
P-Card Transactions Approved
105,872
Purchase Requisitions Submitted
11,105
CORE Labs Orders Totaling \$ 18.1 Million, Completed
99,205
Purchase Orders Issued



A New UNC Online

This past year, UNC-Chapel Hill began offering online courses through UNC Online, the program that allows students across the state and beyond to find and register for online courses offered by all UNC System universities. Making these courses more visible is a good thing for UNC students across the state.

The Enterprise Applications team did the systems work needed to make that participation possible, including implementing new web services to allow staff to maintain the classes, allow students to register for them, and to allow grades and transcript information to be exchanged between the Banner system used by most participating universities and the PeopleSoft system that UNC-Chapel Hill and NC State use.

This work makes it easier for external students to take Carolina online courses, while also making it easier for Carolina students to complete online courses at other UNC system schools.



Gaining Valuable Feedback from the “Mosts”

In January 2018, ITS Enterprise Applications re-launched its series of “Most” Lunches to recognize hands-on users of ConnectCarolina and to learn from attendees what works and what can be improved in the ConnectCarolina system. The lunches also enable peer-to-peer sharing of tips and tricks. Frances Dykstra, Associate Vice Chancellor for Enterprise Applications continued the tradition to spotlight and celebrate our “Mosts” during the 2018-2019 fiscal year.

“Most” Lunches recognize the ConnectCarolina users who entered the “most” of a type of transaction such as HR actions or vouchers. In July, Dykstra recognized campus employees who entered the highest number of Gradstar transactions into ConnectCarolina during fiscal year 2018-2019. Gradstar is a ConnectCarolina Student Administration application designed to collect and report all non-service fellowships, tuition, and fee awards given to a student in support of their attendance at the University.

The team alternates topics and groups of ConnectCarolina users — from Student Administration, Human Resources/Payroll, Reporting, Finance and University Services. Four “Most” lunches in 2018-2019 recognized 50 attendees, who, during 2018-2019 fiscal year, completed:

- 20,826 GradStar Award entries
- 4,241 Payroll Accounting Adjustment Tool (PAAT) transactions
- 86,105 Central Office Approval transactions
- 248 Time Information Management (TIM) adjustments

For the ConnectCarolina team, the “Most” Lunches provide direct access to the people who enter these “most” transactions into the system. Gaining these insights enables the team to improve ConnectCarolina and thus better serve the University.



Jen Bartush, Senior HR Business Analyst and Fran Dykstra, Associate Vice Chancellor for Enterprise Applications present a “Most” Central Office Approvals award to Carole Tropiano, Account, Budget Planning and Analysis Central Office.



Better Ways of Reaching Students to Explain Registering for Classes

In today's world of Google, 280-character tweets, and six-second videos, we have had to adapt to how students want to consume our information. Many students don't want to read more than a page of written instructions or spend more than a minute watching an online training session. So, how do we get them the information they need to know? With the ConnectCarolina Makeover earlier this spring, the ConnectCarolina Team partnered with the Office of the University Registrar (OUR) to try something completely different. Together they created a series of online mini-videos explaining how to register for classes, find their advisors and recognize common registration errors. In the videos, animated college students explain key concepts in under two minutes, giving students exactly the information they needed and no more. According to Amanda Casella, the Registration Team Lead at OUR, "the video series has been a HUGE hit at the New Student Orientation and has been very helpful for our students registering this summer." They're now housed on the Registrar's website so that students can get a quick refresher any time they need it.

Easier Approvals for Managers With At Least One SHRA Employee

A pain point for managers with both SHRA and EHRA employees - and for TIM Administrators across campus - has been that those managers could see all of their employees listed in TIM but could only review and approve timecards for their SHRA employees. HR Representatives had to create a separate, often manual, process for reviewing and approving EHRA employees' timecards.



That pain point was corrected in mid-December when the ConnectCarolina team worked with Payroll Services

to enhance TIM access so that managers who have at least one SHRA employee can see all of their employees, both SHRA and EHRA, in TIM and approve their time. This long-awaited feature was welcomed by managers and TIM Administrators alike. Alas, departments, schools and divisions who have managers supervising only EHRA employees must still maintain a separate process outside TIM due to the cost of licensing seats for all of those managers. Additional improvements are planned for TIM in 2019-2020.

Less Paper Is Better for the Planet and for Security

Two of last year's enhancements made employees' information more secure and reduced the paper used for payroll forms. Since late 2016, employees have been able to see their W-2s in ConnectCarolina, but they also received a printed copy. Beginning in October 2018, employees can use ConnectCarolina to opt out of receiving a printed version of their W-2s.



Starting in April 2019, employees can also manage their direct deposit accounts in ConnectCarolina. Instead of sending a paper form through campus mail, they can change the bank account their direct deposit goes to and split their deposit to multiple accounts online.

Managing payroll forms in ConnectCarolina instead of on paper means fewer people need to handle those forms, which in turn means stronger security and more sustainable processes.

Better Ways to Buy What You Need



According to the Operational Excellence website, "a purchase of less than \$250 costs the University between \$50 and \$200 in staff hours to process a voucher, in addition to the actual cost of the item." During the last year, Purchasing Services set out to reduce the number of vouchers that were created for these small dollar purchases. The Enterprise Applications team worked with staff in Purchasing Services to support the changes.

- In September 2018, we released an improved P-Card program. The improved program included updated P-Card policies to allow more low-dollar purchases, such as conference registrations and professional memberships, to be made using a P-Card. The program also included moving from a homegrown reconciling system to an upgraded reconciliation tool, Bank of America's online Works system which offers greater functionality and efficiency to campus users, as well as better reporting capabilities. (continued)

Better Ways to Buy (continued)

- Early in 2019, we supported  Procurement in adding a new supplier, Amazon Business, to eProcurement in ConnectCarolina. With Amazon Business, UNC-Chapel Hill consumers can compare vendors and prices, view available stock, shop tax-free, and receive free two-day shipping on eligible Prime items for UNC-Chapel Hill Amazon Business orders.



- In June 2019, we increased the spending limit in the eProcurement vendor catalog system to \$25,000, and implemented the flexibility to set each vendor's maximum individually.

These changes, the result of an effective partnership between Procurement and Enterprise Applications, give campus staff more choices and flexibility when making purchases for the University and, because they have fewer vouchers to create, saves time for both campus staff and the central office staff who need to process those vouchers. The changes are already starting to translate to significant savings for the University.

ConnectCarolina Milestones Celebrating the 10-Year Anniversary



On March 28, about 100 ConnectCarolina team members and campus partners got together at the Carolina Club to celebrate significant milestone achievements.

This summer marked the 10-year anniversary of the student systems moving to ConnectCarolina, the PeopleSoft system. Finance and HR/Payroll systems followed suit in 2014. Over the last 18 months, the ConnectCarolina team put in long hours to successfully upgrade all three components to the latest software version.

Speakers at the event included:

- Bob Blouin, Executive Vice Chancellor and Provost,
- Jonathan Pruitt, Vice Chancellor for Finance and Operations (via video recording),
- Mike Barker, Interim Vice Chancellor for Information Technology Services and Chief Information Officer,
- Andy Johns, Senior Associate Vice Chancellor for Research,
- Vicki Bradley, Associate Vice Chancellor of Workforce Strategy, Equity and Engagement,
- Allison Legge, Senior Associate Director of Enrollment and Undergraduate Admissions.
- Fran Dykstra, Associate Vice Chancellor for Enterprise Applications and Event Host



ConnectCarolina User Conference

Making Connections at the 2018 ConnectCarolina User Conference



"Making the Connections" was not just the theme of the 2018 ConnectCarolina User Conference, it proved to be the aspect participants found most meaningful. As Payroll Director Walter Miller said, "The ConnectCarolina User Conference was an immensely valuable time to connect with colleagues who I don't always see and to learn about the good administrative work occurring all across campus."

On Thursday, October 18, 2018 nearly 700 participants, speakers, volunteers, and vendors spent the day sharing information with and learning from each other at the second ConnectCarolina User Conference. There was something for everyone who uses ConnectCarolina to do their work with 70 sessions and workshops in Finance, HR/Payroll, Reporting, Research, Student Administration and General Interest categories. Among the most widely attended sessions were: *PCard 101: What You Need to Know; Understanding the Steps the Finance Transactions Go Through; Tricky HR/Payroll Transactions and Birds of a Feather* sessions which were more informal and provided an opportunity for attendees with a shared interest to connect with each other.

Participants also mentioned learning about ConnectCarolina best practices and Chief Information Security Officer Dennis Schmidt's keynote address, *Data Security, Why We Need to Protect UNC's Information* as meaningful aspects of the conference. One participant said, "It was extremely eye-opening. I used to think the 2-step was an inconvenience but now I understand the 'why' behind the 'what.'"

Registrations for the conference filled in 26 hours, which meant the planning committee had to reluctantly turn away many staff members. Fortunately, Zoom, the new online conferencing tool, provided an easy way to record sessions, making the conference content available to a broader audience than could physically fit in the Student Union spaces.

Another key technology for the conference was the conference "app." Two-thirds of participants and speakers downloaded the app and used it to find sessions, read speaker profiles, participate in polls, introduce themselves, and upload photos for a contest. The conference theme was "Making the Connections," and the app helped participants do just that.



"I found a lot of training to be beneficial especially the *HR Representative Birds of a Feather* session. It was great! Shout out to the User Conference!"

**Laurie Boudler, Human Resources Consultant
Office of the Executive Vice Chancellor and Provost**