

ConnectCarolina Accomplishments

Fiscal Year 2016

Finance

- Added a new business unit UNCBBR
- Completed subsystem reconciliation
- Created campus spreadsheet journal template enhancements.
- Developed CAFR: Indirect Cost Allocation methodology
- Did analysis and prepared a decision document for separating purpose from fund in the chartfield string.
- Prepared a decision document for modifying the campus journal entry function.
- Set up new joint venture entity in PS (Qura), phase 1.
- Completed converting Source Requests.
- Created a solution for journal entry approvals workflow.
- Allowed campus users to view invoice images for an extended period of time.
- Retrofitted Spend Compass.
- Added an audit view for workflow approvals.
- Added new retirement option functionality for asset management.
- Prepared and issued 1099s.
- Resolved an issue with duplicate TCF orders in ePro.
- Implemented asset management mass change functionality.
- Implemented fixes to foreign wires.
- Implemented fixes to workflow approval statuses.
- Implemented match rule for the ePro Vendor Catalog.
- Implemented a process for handling credits on ePro orders.
- Provided the state auditor with the project type for journal lines, as requested.
- Updated the OSR Summing Audit table.
- Made required changes to the GL workflow.
- Added Chandrika Rao's signature and image to the Source and Fund authorization.
- Created year-end reports for elimination and scholarships.
- Provided the annual asset file for NCOSA.
- Made changes to Spend Compass purchase order file.
- Created a custom invoice for Fixed Price projects for business unit CHOSR.
- Created the State Earned Carry Forward report for the budget office.
- Updated the utility that scans ConnectCarolina attachments for viruses.
- Added the buyer signature on purchase orders.
- Created the Foundation Source by Account report.
- Updated the memo bank view to include department ID, classification and project.
- Made a fix related to invalid dates in the journal extract.
- Made OSR Contract Amendments to the fixed price model.
- Added a view to support the Energy Services Cash Allocation.
- Made required revisions to the Quarterly AP Funding Vendor Payments report.
- Added a new table for the Finance security audit.
- Added a new ePro Vendor Catalog for Fisher Scientific.
- Made a change to track without budget for OSR Child accounts.
- Included Capital Improvement journals in the NCOSA data.
- Updated historical Asset Management data to include project ID.
- Updated PeopleSoft Cost Collection Reconciliation.
- Updated Project Costing allocations to include description.
- Added a new Vendor Catalog link for existing ePro vendors, Sigma, Bio-Rad, Life Tech, and Roche.
- Updated fixed contract statuses to "pending" for billing purposes.
- Cleaned up security based on the results of the Finance MOU audit.
- Extracted Spend Compass vouchers.
- Updated PO Information page.

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Finance (continued)

- Created Contract reports in PDF format.
- Added the OSR Sponsor information for billing.
- Made adjustments to NCAS page and process.
- Added the foreign amount field for State Audit extracts.
- Cleaned up the OSR Contract Billing plan.
- Decommissioned FinanŞeer and implemented a new version.
- Stopped all vouchers with 1088 flagged accounts in approvals workflow.
- Set up new business unit for Qura Therapeutics.
- Made update for OSR approval authority.
- Fixed duplicate contract to billing interface IDs.
- Developed fund authority reporting in ConnectCarolina for FRS accounts.
- Accommodated a new ledger in NCAS month-end extracts.
- Changed the payload ID on ePro orders from date and time to PO ID.
- Corrected a year-to-date calculation for the depreciation of assets.
- Made new enhancements to the NCAS adjustment entry pages.
- Added the ability to attach documents to contracts.
- Added a new disposal code for Asset Management.
- Made an enhancement to nVision report layouts related to the GL.
- Added related content for voucher-related approvals.
- Added chartfields and country to the Spend Compass extract.
- Consolidated SPOTS error reporting.
- Added a new field for F&A reclass allocation.
- Implemented Software Acquisition in ConnectCarolina.
- Created the OSR Contract Closeout report.
- Validated CAFR/MGMT reports on the reporting date.
- Added a new IP address for ePro vendor Airgas.
- Redesigned the OSR invoice.
- Improved security for ImageNow attachments.
- Updated workflow approvals.
- Made effective date changes in Grants Management tables.
- Modified the Incomplete Receipt and Invoice report.
- Added the buyer to item categories.
- Removed old BI Publisher reports.
- Updated the money market allocation.
- Configured BI Publisher to allow the PeopleSoft-delivered invoice, SF-270, to print.
- Uploaded a spreadsheet for NCAS adjustments.
- Created voucher notice email for the GA travel office.
- Updated Catalog of Federal Domestic Assistance (CFDA) numbers on grants award data.
- Added the ability to display POs and attachments by email.
- Made MOU contact changes.
- Re-assigned billing authority for OSR.
- Created the OSR Project GL Expense and Budget Report in BI Publisher.
- Expanded extracts for the state auditor.
- Onboarded new ePro Vendor Catalog vendor Genesee.
- Updated BP17 budget definitions configuration.
- Allowed voucher delete to have five parallel run controls.
- Updated the billing specialist on billing plan for OSR.
- Added new Unit Accounting System (UAS) reports for the fair market value allocation done monthly.
- Applied a fix to resolve an issue with project status effective dates.
- Added a new budget pre-check component.
- Prepared the budget period 2017 associated budgets table.
- Created budget attributes for student affairs.
- Added an option to filter by project ID to the OSR payments report.
- Modified NCAS month-end to better distinguish UNC from GA.
- Created a new portal for Software Acquisition hosted on cloud applications.
- Secured the Independent Contractor social security number behind the firewall.
- Changed the ability to drill down for more details in reports built using the nVision tool.

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Finance (continued)

- Created new trial balance reports for GA.
- Created nVision reporting layouts and queries for the foundations.
- Revised the UNCGA Cash Details report.
- Rebuilt commitment control data in the data warehouse.
- Updated the UAS attribute.
- Completed commitment control reconciliation.
- Made audit changes to Finance MOUs.
- Made a change to print a traveler's name in the remittance details of the reimbursement check.
- Automated the generation of Pcard reports.
- Increased per-diem rates for meals for travelers.
- Made a change that permits searching for all departments on Web Travel Reports page.
- Added a field for entering travel purpose on Web Travel reports.
- Added the Pcard auditor role to the Pcard system.
- Made improvements to reconciling Web Travel airfare each month.
- Created Web Travel preaudit and approval for GA.
- Created a Web Travel workload report for GA.
- Created a Travel Office activity report.
- Added fiscal and contact information to Pcard and CABS journals.
- Implemented a new policy and process for social security number and name changes.
- Conducted school and division security audits.
- Implemented guest ID registration for terminated employees to access W-2s and paychecks.
- Implemented the 2015 ARP.
- Implemented the 2015 Legislative \$750 bonus.
- Modified employee records to reflect changes in the number of standard working hours in the fiscal year (2080/2088/2096).
- Updated the InfoPorte Performance Management Tool for the 2016 review period.
- Accommodated changes to the State of North Carolina employee probation dates.
- Automatically terminated students who were not returned from short work break at the end of summer.
- Assisted various projects in other areas which intersect with HR areas.
- Built out daily audit reports to check for various data issues.
- Implemented audits on various HR ConnectCarolina pages.
- Implemented HR/Payroll bundles current through 1Q2016.
- Prepared and submitted data to EOC for UNC's EEO plan.
- Made updates to the ConnectCarolina portal.
- Transferred the Concordia Cybermation file.
- Implemented a short term solution for benefits arrears cleanup.
- Implemented 2015 1042S – taxation for non-resident aliens.
- Added an FAQ link to the W-2 Employee Self Service page.
- Reported W-2s.
- Applied payroll tax update A.
- Opened Employee Self service online submission of NC-4 and W-4.
- Provided 2014 W2s to employees view Employee Self Service.
- Applied tax update 15E.
- Updated the Hold button in ePARs to resolve routing issues resulting from resubmitting ePAR forms.
- Gave former employees access to Self Service so they can access their pay stubs and W-2s.

HR/Payroll

- Enabled benefits audit capability.
- Made changes to comply with ACA year end reporting requirements.
- Changed benefits enrollment vendor to Aon Hewitt as required by the state.
- Produced benefits statements.
- Provided data for Medicare Data Match requirements.
- Reverted back to BenefitsFocus from Aon Hewitt as required by the state and conducted annual enrollment.
- Streamlined leave of absence billing.
- Distributed data on Campus Security Authority and Responsible Person to schools and divisions.
- Implemented Federal W-4 Self Service.

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HR/Payroll (continued)

- Updated the FY2016 department budget deduction table for benefit plan changes.
- Implemented Windstar-PS Interface upgrade 2.6.
- Loaded SPA performance ratings.
- Implemented TIAA-CREF ORP vendor required file change.
- Update configuration for UNC System 457 plan.
- Made changes to the affiliate page.
- Made GA DataMart changes.
- Applied Summer School Faculty terminations as a mass update.
- Migrated military status translate values.
- Applied Tax Update 15-C.
- Implemented the PAAT.
- Made a fix related to the terminations feed in Law Logix.
- Added position number to the UNC Employee Information page.
- Updated ePAR forms to allow users to specify funding as a percentage of the whole rather than specific dollars.
- Added an email address to a query.
- Modified the health insurance retro payment process.
- Converted data from the Short Term Retro tool.
- Updated approval workflows related to PAAT.
- Populated faculty category field.
- Made InfoPorte changes related to the PAAT tool.
- Created PAAT audit queries.
- Appended PAAT conversion rows to custom tables.
- Added a new benchmark field for UNC position attributes.
- Applied Tax update 15D.
- Made a change related to payroll routing and approvals workflow.
- Applied a modification related to the bi-weekly medical arrears update.
- Changed references from SPA/EPA to EHRA/SHRA where externally visible.
- Added a new link to HR WorkCenter related to position history.
- Extended the text message field for pay stub messages.
- Decommissioned the legacy HR (HRIS and HR Central) applications.
- Added new functionality for PAAT with negative amount retros.
- Printed 2015 W-2s.
- Completed 2015 general year end clean up.
- Made updates to 2015 W-2s in Box 13.
- Made changes to the Hire form routing per EPA recruitment project.
- Changed the SPA probationary end date on Job data.
- Applied Tax Update 16A.
- Completed PAAT batch process with FP fringe fix.
- Implemented a long term solution for correctly applying Faculty Physicians fringe benefits charges.
- Removed paychecks from PAAT exclusion.
- Made updates to JCAT tables as required by GA.
- Added comments to all objects on the Suspense report.
- Updated ePAR form routing for academic personnel.
- Added a total to the BI Publisher report for multiple vendors.
- Approved PAAT transactions for STR conversion.
- Created department level budget for FY17.
- Made changes to the Access Request Tool related to the background check system.
- Applied Tax Update 16-B.
- Enhanced one-time payment tracking for the eCERT process.
- Removed the requirement for citizenship from the Hire form.
- Created the department budget table rollover program for FY17.
- Created a State Funded vacancy report.
- Implemented 2017 HCM Department Security tree changes.
- Made the FLSA field updatable by GA originators.
- Modified the Payroll funding report that was created using the nVision tool.
- Improved access to TIM data for ACA processing.
- Created the PAAT Suspense report.
- Provided legacy payroll history.
- Implemented provisional budget checking (which checks budget but does not reserve funds) for HR/Payroll.

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Student Administration

- Retrofitted, tested and deployed multiple bundles of PeopleSoft's application patches.
- Completed Census for all academic terms.
- Implemented Campus Solutions Security redesign for the Financial Aid office, the Undergraduate office, the Graduate Office, the Student Financials office, the Assistant Provost and University Registrar, as well as campus wide offices.
- Implemented multiple changes to support Fall 2016 Med School supplemental admissions application.
- Made changes to multiple online admissions applications for the Friday Center, Undergraduate Nursing, Dental Assistant, Summer School, Physical Therapy and Radiologic Science, Part Time Course Studies, Pharmacy Supplemental, Certificate programs.
- Hid Schedule Disbursement date on Student Self Service.
- Fixed issues and made changes to the GA Student Data Warehouse views and supported uploads each term.
- Completed student withdrawals.
- Automated the Student Financials MSHI waiver process.
- Made enhancements to GradStar and implemented a fix for budget checking.
- Updated Undergraduate Admissions application evaluation review process, made updates to the Common App, summary reports.
- Modified and added multiple test score changes in support of admissions processes.
- Made a change related to the applicant search page for improved performance.
- Made changes to the transcript for MED career.
- Updated the building table short descriptions.
- Created queries for the Student Financials office to maintain the BCBS waiver.
- Made changes to transfer course equivalencies related to student experience.
- Cleaned up email addresses related to leading spaces and tabs in email.
- Updated the Pharmacy Enrolment Deposit link in the Student Center.
- Added a Medical School enrollment deposit.
- Changed enrollment deposit language for money orders or check for the School of Medicine and the School of Pharmacy.
- Made change to Campus Solutions Admissions SGR page and toolkit.
- Added payment option for Pharmacy enrollment deposit.
- Made changes to the Athletics summary report.
- Applied a patch related to SEVIS release 6.23 batch processing updates.
- Added a GradStar remission sum view.
- Implemented a fix related to SEVIS alerts.
- Added a new override value for FA SAP custom process.
- Implemented 2015 1098T process.
- Redesigned "My Schedule" in the Faculty Center.
- Modified the transfer credits equivalency report.
- Made enhancements to the academic early warning.
- Made a language course drop consent update.
- Performed GradStar eligibility audit.
- Populated diploma names.
- Opened online app for the Friday Center for summer and fall.
- Migrated SIS Audit tables to PeopleSoft tables, shut down all student related mainframe activities.
- Implemented GA online course proctoring.
- Applied a fix for prospect/applicant search performance issue.
- Implemented CourseLeaf Catalog Management Software.
- Made changes to the Self-Reported course pages.
- Made a security change from redbox role change to internal role for admissions.
- Made a change to Professional School file parser for WebAdmit.
- Made updates related to the Barnes and Noble Student Stores transition.
- Removed requirement designations from courses.
- Supported the implementation of the Slate admissions system for Kenan-Flagler Business School.
- Implemented Thrive@Carolina General Education requirements dashboard.

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Student Administration (continued)

- Added the academic plan to the advisor freshmen view.
- Created queries for the registrar's office to validate data uploaded to the GA Student Data Mart.
- Made changes to Slate PID interface for file path.
- Optimized GSHIP search.
- Implemented ITR Major/Minor Change Request.
- Added OASIS view test credit for first year orientation.
- Implemented College Scheduler for PeopleSoft.
- Moved Order textbooks to Barnes and Noble.
- Ran updates for Race-Ethnicity.
- Implemented CLAMAV virus scan.
- Supported annual Admissions Decision Release for admissions offices.
- Made enhancements to SIS Yellow checks report.
- Made changes for ISSS document upload for Kenan-Flagler.

University Services

- Enhanced PID Selection in the PID inquiry page.
- Removed desk copy request functionality.
- Implemented service call and letter of understanding.
- Added budget check to telecom journal entry file creation.
- Created a one-time report related to UNC-CH employees for the Athletics ticket office.
- Deployed CBM enhancements to production.
- Replaced old login pages from the legacy mainframe computer and simplified user access for Friday Center CEU.
- Allowed affiliate creation with 100+ matches error.
- Added the PID to the Affiliate Request inbox.
- Implemented new DE tuition rate for Friday Center apps.
- Made a change to Print Stop related to Xerox printing.
- Made changes to HazMat pickup.
- Made changes to HASMIS system.

- Implemented a default reporting year fix for Friday Center apps.
- Added the option to upload journal entries by web service to the CCAAdmin system.
- Changed working due date on printing order pages.
- Modified the compliance portal.
- Added logging for PID Create actions for Friday Center CEU.
- Made updates to Student Stores Department Charges processing.
- Enhanced the Student Stores' Printing Request for Quote functions.
- Allowed persons without Onyens to request copy service from Carolina Copy.
- Enhanced the waitlist process for web registration for Friday Center applications.
- Created a new system to handle printing business reply envelopes.
- Made changes related to the EHS HASMIS system report and form.
- Added new journal sources in the CBM system.
- Enhanced 2/5 business day rules for PrintStop orders.
- Improved Carolina Copy's validation of chartfield strings.
- Enhanced CEU transcript request process for Friday Center applications.
- Re-deployed the SAI application, phase 2.
- Made a fix related to country-state validation for Friday Center applications.
- Enhanced residency options for Friday Center applications.
- Provided a "Secure Print" function within PID Create.
- Modified the Bill Presentation system.
- Altered the PID Create option to allow utf8 and Latin characters.
- Made modifications to eCommerce.
- Allowed PID inquiry results to be sortable.
- Made changes and enhancements to Printing and PrintStop.
- Modified the Environmental, Health & Safety application used to search for affiliates.
- Changed business card delivery for Student Stores' printing.

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University Services

- Enhanced the logon process for Friday Center applications
- Made changes to how journals are created in CBM.
- Optimized building selection and display in CCUpdate Service call.
- Changed remote location name and schedule for the Textbook function.
- Enhanced the PID process for CEU for Friday Center applications.
- Added two person of interest (POI) types to PID Create.
- Added an Office Use Only space to the Print Stop order form.
- Made changes related to static messages in Friday Center applications.
- Added the ability to view attachments in the Bill Presentation application.
- Resolved minor issues for the UNC Student Stores Textbook Department.
- Enhanced the roster process for CEU for Friday Center applications.
- Modified the system to manage a new meter reading file for Carolina Copy.
- Rearranged fields on the Affiliate Request System's entry and display pages.
- Upgraded the AiM system, which is used by Facilities to manage maintenance work.
- Added a hazardous incident email to the HASMIS system.
- Made changes to Lab Safety Plan related to Schedule F questions.
- Enhanced course evaluation for Friday Center apps.
- Added a page to PID Create to add person of interest (POI) from a selected source.
- Enhanced printing reorders and PrintStop file uploads.
- Made fixes related to the Friday Center applications and PID Create.
- Resolved "Accounts with no machine/invoice" issues in the CCAdmin system.
- Made updates to the HASMIS system.
- Added an option in Letterhead orders to be able to have a blank second page.

- Upgrade the CS Gold system from 6.0.2 to 7.0.6.
- Made Schedule F modifications.
- Made changes to the static text in Friday Center applications.
- Changed "Ram Shop" to "Tech Shop" in the CCI portal.
- Made refinements to the PrintStop order pages.
- Decommissioned the FBA VB application.
- Expanded the CCAdmin system to deal with building address issues.
- Made updates to immunization records.
- Changed what the Clerk access role sees in hospital queries.
- Improved handling of improper portal URLs for Carolina Copy.
- Set up CS Gold (One Card) license and BN location.
- Modified the Lab Safety Plan Application.
- Upgraded TouchNet to 6.5.
- Add invoice retrieval from ImageNow to the CBM system.
- Refined PrintStop orders and removed desk copy requests.

Reporting

- Inventoried, documented and validated SAS Visual Analytics reports.
- Developed CAFR: Interim Financial reporting, followed with enhancements for External reporting.
- Created fiscal year end reports for Incomplete Receipts and Incomplete Invoices.
- Rewrote the Blue Book for FY16.
- Inventoried, documented and validated queries.
- Created the OSR Departmental Federal Assistance Financial Systems Recipient Report of Expenditures.
- Inventoried, documented and validated nVision reports.
- Created the OSR Contract Closeout report.
- Made enhancements to PAAT Labor and Expense report.
- Rebuilt the data structure used by InfoPorte.
- Planned changes for the Faculty Physicians queries.
- Made updates to HR queries related to summer hiring.
- Created a custom view for various nVision reports.
- Added detail to a GL report.

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Reporting (continued)

- Created a new nVision report for Athletics department analysis.
- Created queries for GA.
- Implemented the SAS 7.1 upgrade.
- Created the general ledger-based State Carry Forward Report (also called the “Blue Book”).
- Updated the Faculty Physicians query.
- Created the OSR Payment Report for internal use.
- Implemented the InfoPorte 6.7 quarterly upgrade.
- Created the FASB Foundation financial statements.
- Created the SAS Labor & Expense report.
- Created the Labor Expense Summary Report.

Cross Functional

- Added and updated departments for Fiscal Year 2017.
- Implemented the PeopleTools upgrade to 8.55.
- Implemented the ImageNow 6.7 upgrade.
- Automated mass removal of roles related to specific users in ImageNow.
- Implemented an annual process related to moving graduate school documents in ImageNow.
- Converted to a new document type in ImageNow.
- Added a MessageAgent structure in ImageNow.
- Made image and icon changes to the Portal announcements.
- Made a necessary security change related to the ImageNow Service Account password.
- Made a fix related to firewall vulnerability.
- Uploaded documents for name and social security number changes using ImageNow.
- Preloaded Undergraduate admissions guest IDs.
- Implemented new ARC request process through the Access Request Tool.
- Updated the HR Security roles in the Access Request Tool and mapped the Commitment Accounting reports role.
- Secured the Access Request Coordinator role within InfoPorte security.

Acronym Key

This...	Means ...
ACA	Affordable Care Act
AP	Accounts Payable
AR	Accounts Receivable
ARP	Annual Raise Process
CABS	Central Airfare Billing System
CAFR	Comprehensive Annual Financial Report
CBM	Customer Billing Management
ePAR	Electronic Personnel Action Request
GA	UNC General Administration
GL	General Ledger
GSHIP	Graduate Student Health Insurance Program
MOU	Major Organizational Unit
NCAS	North Carolina Accounting System
NCOSA	North Carolina Office of the State Auditor
PAAT	Payroll Accounting Adjustment Tool
PO	Purchase Order
SPOTS	Space Planning & Occupancy Tracking System.
TIM	Time Information Management
UAS	Unit Accounting System