

ConnectCarolina Accomplishments

Fiscal Year 2017

Finance

- Supported the submission of GA's & UNC-Chapel Hill's CAFR for FY16.
- Automated the deletion of journals containing errors.
- Enabled the use of multi-year contracts at UNC-Chapel Hill.
- Completed and rolled out modifications to campus journal entry functionality to allow multiple lines in a single journal.
- Configured applications to withhold state taxes for eight states/localities in addition to NC.
- Enabled campus to establish multi-year contracts for purchases.
- Provided continuing support for 2016 fiscal year close, the annual financial audit, and for the OSR transformation initiative.
- Validated additional financial reports.
- Completed a project to improve the performance of Finance applications.
- Released new alerts to campus to provide information on budget errors on purchase orders, requisitions and vouchers.
- Completed a transfer into the Information Technology Services Enterprise Application team to reduce costs and streamline decision making.
- Updated quick invoice flags.
- Updated the annual asset audit extract report.
- Deleted and edited attributes for Student Affairs and added validations for chartfield strings.
- Added additional standard details to ACH format.
- Placed inserts for custom formula allocations table.
- Started sending email alerts for missing receipts.
- Updated Cash Advances to prevent pricing and billing rows for OSR.
- Rolled non-XML purchase orders with potential incorrect budget dates.
- Redesigned the speedchart functionality (an option that allows chartfield strings to be entered more quickly) for OSR.
- Zeroed remaining pre-encumbrance and encumbrances from BP2016.
- Onboarded Qiagen as a new ePro Vendor Catalog vendor.
- In campus vendor, prevented users from entering duplicate PIN/TINs.
- Updated the Grants Management ledger.
- Updated speedcharts (which allow users to enter chartfield strings more easily) for OSR.
- Uploaded reimbursement and travel transactions as non-taxable, as needed.
- Added two new asset management queries.
- Modified accrual file extract for the NCOSA.
- Ended project customization for OSR Project Close.
- Added the Controller's signature to the Source Create option.
- Made project ID changes for project status.
- Updated the templates for processing Requests for Quotes (RFQ) and Invitations for Bids (IFB).
- Fixed performance issues related to deleting budget journals.
- Migrated to a new platform for the Dell ePro vendor catalog.
- Allowed custodian access to asset attachments.
- Added reporting filters for searching for F&A formula allocations.
- For the Budget Office, completed the Blue Book Report and State Carry Forward Report.
- Installed a new certificate for ePro vendor catalog CDW.
- Made changes to the approvals workflow for OSR.
- Created new OSR ledger views and BI Publisher reports.
- Improved performance with PO web service fix.

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Finance (continued)

- Fixed an error related to capital improvement projects.
- Removed the ability to do an open search on Tax ID for independent contractors for campus.
- Updated the approvals requirements for GL for OSR.
- Updated speedcharts (a method for entering chartfield strings more quickly) in the Departmental Deposits module.
- Made manual production changes for Student financials.
- Added denied statistics to voucher processed queries.
- Created OSR GL Expense and Budget Report for campus.
- Removed email for reimbursement accounting period voucher.
- Added a view to support allocations between Commitment Control State ledgers and the GL State ledger.
- Gave GA the ability to use and maintain speed types and combo edits (the part of the system that validates chartfield strings).
- Changed the wording on the BMS report in InfoPorte.
- Reduced category codes returned in search results for GA.
- Tuned performance for processing grants.
- Added a new certificate for ePro Vendor Catalog vendors VWR and Bio-Rad.
- Refunded accounts receivable funds.
- Created a method for tracking changes to project tables.
- Corrected posting errors for accounts receivable.
- Created State monthly financial reports.
- Expanded the use of view that compares the GL to Commitment Control.
- Added a new NCAS view for GA.
- Tuned performance for a custom reconciliation process for Commitment Control.
- Added a step to the approvals workflow for vouchers when they are for foreign vendors.
- Added a new view and query to identify variances between Commitment Control and the GL.
- Enhanced the project status customization for GA's contracts and grants.
- Changed security for queries so that campus can only create private queries.
- Made a necessary security change to the CHGBL business unit.
- Made changes to the Web Travel and Pcard applications for the project close initiative.
- Updated ImageNow certifications for the Web Travel and Vendor Invoice Submission Process (VISP) applications.
- Changed the frequency that vendors are updated in Web Travel.
- Removed the ACH warning message for student travelers.
- Provided a field for entering airfare on the GA travel authorization.
- Made improvements to the Central Airfare Billing System (CABS) reconciliation process for travel.
- Automatically entered contact info in Web Travel.
- Adjusted Web Travel to reflect new reimbursement rates for car travel.
- Updated the sign-on method for the Finan\$eer system.
- Added new mileage rates for the motor pool.
- Added two Web Travel customizations for GA.
- Customized the Web Travel Acknowledgement form for both UNC-Chapel Hill and GA.
- Added validations for processing voucher feedback.
- Created and deployed the new Salary Funding report.

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HR/Payroll

- Completed GA-mandated changes to the HR DataMart.
- Closed and submitted UNC-Chapel Hill's HR data to the GA DataMart each month on schedule.
- Enrolled clinical fellows into the ConnectCarolina Benefits application so benefits administration for that group is no longer a separate, largely manual process.
- Made all system changes needed to implement changes to the Federal Labor Standards Act (FLSA) and then backed them out over Thanksgiving weekend in response to an injunction against the implementation of the regulations.
- Completed seven separate projects to implement annual raises, legislative increases and bonuses approved by the NC State Legislature during Summer 2016.
- Completed programming to send UNC-Chapel Hill data on ACA coverage to UNC-Chapel Hill System Vendor in support of annual reporting requirements
- Upgraded the Time Entry System (TIM) to the latest version.
- Created a separation of duty audit process.
- Updated logic for leave liability accruals.
- Modified employee records to reflect changes in the number of standard working hours in the fiscal year.
- Made changes to the Orbit interface.
- Performed payroll cycle maintenance.
- Loaded the GA performance management data.
- Completed a mass update for Summer School faculty terminations.
- Applied tax update 16-C.
- Updated Maximum Program Option (MPO) within Benefits.
- Implemented updates for the Identity Management feed.
- Added an ACA page for TIM pay codes.
- Loaded a file to automatically terminate SPA Students and Temps.
- Applied changes to SHRA exempt employees.
- Made changes to Gideon Taylor tables to populate funding end dates for cost sharing.
- Prepared and submitted data to the Equal Opportunity and Compliance Office for UNC-Chapel Hill's Equal Employment Opportunity plan.
- Updated the department budget table with a suspense program.
- Added a fellows report.
- Improved performance for the Bio Demo process.
- Added a new value for lump sum payment status.
- Completed payroll audits.
- Cleaned up department contacts for the federal notification report.
- Modified the payroll funding report to accommodate multi-state taxation.
- Implemented a modification related to the ACA.
- Implemented 2017 benefits configuration changes.
- Loaded the W-2 file for 2016.
- Applied updates to the retro benefits deduction table for the annual benefits enrollment.
- Updated the action reason for the post doc pay changes.
- Created a process to identify errors in benefits retro calculations.
- Applied tax update 16E.
- Ran the calculate compensation process to ensure compensation is updated in Job Data.
- Updated 2016OFF02 pay calendar.
- Added a new learning management report.
- Gathered and loaded Responsible Employee and Campus Security Authority designations for the Clery Act.
- Created a new benefits document type.
- Enhanced the HR Expected End Date report.
- Created a Suspense Analysis report.
- Implemented a fix related to salary alignment.
- Created a security role to match the job needs for the Commitment Accounting business analysts.
- Granted business analysts access to the View W-2 page.
- Changed security related to the lump sum payment component for HR representatives.

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Student Administration

- Retrofitted, tested and deployed multiple bundles of PeopleSoft's application patches.
- Implemented a new admissions application (Slate) for the Graduate School, for supplemental applications for School of Medicine and School of Law.
- Completed the Fall 2017 and Spring 2017 census.
- Created and sent data files to support eXplorance Blue, the new Office of Institutional Research instructor evaluation tool; provided system links for students to use.
- Incorporated mandated changes to the programs that submit monthly student data including financial aid data to the GA Data warehouse.
- Supported the Thrive@Carolina initiative by updating rules regarding the treatment of repeated courses and transfer courses.
- Automated a BioMedical Engineering program form for students transferring to a new joint UNC-Chapel Hill/NCSU undergraduate major.
- Reduced budget-related processing issues in the systems supporting payments to graduate students and support of their insurance benefits (GSHIP).
- Replaced a check-printing application to improve the Bursar's Office processing of refund checks.
- 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.
- 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.
- Added a new view in ImageNow for Academic Advising.
- Allowed phone number updates via the Student Center and Mobile.
- Supported annual Admissions Decision Release for admissions offices.
- Uploaded instructor feedback data to ASPSA access database.
- Implemented a new solution in CC for managing undergraduate student requests for a change of major that requires an application process to professional schools (KFBS, Journalism, SILS, etc.).
- Ran the nightly Barnes & Noble enrollment file.
- Updated the 2016-2017 Financial Aid cycle functions, applied required software patches
- Made a configuration change related to student milestones.
- Made changes to maintain student diploma names, separate from preferred.
- Upgraded the College Scheduler to support student course registration process.
- Updated the GradStar Maintenance page and inactivated certain GradStar awards.
- Added a pop up message to the Student Center related to the drop rule.
- Made a change to the batch refund validation process.
- Removed enrollment deposit option for Slate loaded applications.
- Cleaned up the Hobsons CRM interface as part of the Undergrad annual updates.
- Corrected repeat field values in the course catalog.
- Made revision to Campus Health Services interface.
- Converted yellow and blue check to PeopleSoft.
- Made changes to "View my test scores" page.
- Made changes to the interface that provides residency decision data due from Slate.
- Added file parser for Military Data from Apply Yourself to PeopleSoft.
- Implemented repeat checking for students and excluded repeats from Academic Advisement report.
- Made modifications to transfer credit repeat rules.
- Made school group review changes for 2016-2017 post-graduate admissions process.
- Paired transfer credit process with repeat checking.
- Made updates to instructions and URL for Transfer courses checklist.

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Student Administration (continued)

- Automated the manual process that allows identified students to be blocked from access except for approved staff.
- Implemented 2016 1098T process.
- Made undergraduate military status changes for 2016-2017.
- Uploaded instructional text and functionality for ISSS checklist.
- Added new language for course drop consent for Spring 2017.
- Updated midyear grades and changes for 2016-2017.
- Made changes to FERPA and NCAA attachments.
- Assigned mass access to new career PBAC to campus users.
- Completed Campus Solutions access review reports.
- Added CRC charges to student accounts.

University Services

- Terminated obsolete processing related to textbooks.
- Improved CBM favorites connection from the CCInvoice system.
- Shut down textbook preorder pages.
- Prevented affiliates from having their email addresses overridden.
- Enhanced the data collection submit process for the Friday Center.
- Enhanced and refined the "What's my PID" page.
- Added inner department charges for Student Stores (BN College).
- Broke out ECO and ECD journal sources (related to eCommerce) to be unique per vendor.
- Enhanced affiliate updates by HR representatives.
- Limited the Carolina Copy Invoice to no more than five fiscal years.

- Upgraded the One Card accounting application to visual basic .net.
- Decommissioned the ESBillingWeb system and replaced with the esb2 system.
- Started sending an email when the affiliate request status was changed.
- Updated CBM to make downloading journal entry files more reliable.
- Set up Barnes & Noble Student accounts for textbook purchases.
- Made refinements to the affiliate request process.
- Enhanced the process for downloading athlete schedules.
- Changed PrintStop Order lead time from 48 hours to three ebusiness days.
- Made changes to the CCAdmin system related to invoicing for new machines.
- Improved readability of the CCAdmin system's option for entering manual copier readings.
- Reflected re-branding in email address for Carolina Copy.
- Produced new Memorandum of Understanding for Xerox machines.
- Made refinements to the business card order process at the Print Stop.
- Updated chartfield string validation in CBM and Chartfield Checker to accommodate changes needed for the OSR Project Close initiative.
- Updated the Security User Awareness training materials and quiz.
- Made enhancements for the Friday Center applications related to cancelling and copying.
- Modified the Lab Safety Plan.
- Made small changes to the CCAdmin system related to the Xerox go-live.
- Enhanced Carolina Managed Print Services' (CMPS) CCAdmin system to handle Xerox submissions.
- Made address staffing changes in Carolina Managed Print Services (CMPS) for the CCAdmin and CCInvoice systems.
- Implemented the Friday Center's digital signage GoBoard.
- Modified rules in the hospital update for matriculated persons.
- Updated the HASMIS system (an Environment Health and Safety system).
- Made refinements to the Affiliate Request login.

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University Services (continued)

- Applied a fix to the CCAAdmin system's memorandum of understanding.
- Added "Add'l Charge Type" management to the CCAAdmin system.
- Modified the CIP Funding-Expense report.
- Made Continuing Education Unit (CEU) enhancements for the roster in Friday Center applications.
- Refine printing and PrintStop Order processing.
- Updated Environmental, Health & Safety's compliance portal.
- Made refinements to PID Office applications.
- Modified Lab Safety Plan emails and contact information.
- Updated and corrected addresses in the files sent to the hospital systems.
- Made enhancements to the Lab Rad Worker application and the HASMIS system.
- Updated the Athletic textbook scholarship list.
- Added text related to browser recommendations in PrintStop.
- Automated the process for updating grant mapping for eCommerce.
- Updated the files sent to the Traffic system.
- Completed Xerox invoicing process for CMPS.
- Updated the Select Agents system for Environmental, Health & Safety.
- Purged obsolete data and removed obsolete systems code for Student Stores.
- Deactivated computer order portals on the UNC-Chapel Hill Store Front.

Reporting

- Completed modifications to nightly data loads that resulted in the prior business day's information being available for reporting by 8:00am, for 15 days in a row.
- Implemented new functionality that enhanced research compliance by improving reporting to support the project close-out process and preventing changes from being posted to closed projects.
- Made enhancements to "Expected End-Date" reporting for Human Resources and Commitment Control to help manage employees with upcoming end-dates.
- Created the Suspense Analysis Report to help manage labor costs going to suspense because funding sources have expired.
- Created the OSR Invoice Listing Report which shows open invoices on a sponsored contract or project.
- Piloted a financial actuals and accruals report in Athletics.
- Deployed InfoPorte Releases 6.7.1 and 6.7.2 which included multiple changes and corrections to reports.
- Made display and performance updates to both InfoPorte and the Data Warehouse.
- Added additional totals for the OSR ledger rollup report.
- Added a column in the existing Data Warehouse table for Advancement.
- Created the F&A Formula Allocation report.
- Added retro processing to the Fellows PeopleSoft Query Reports.
- Created a query for Benefits.
- Created benefits retirement audit report.
- Granted access to the reporting environment for GA staff.
- Created the Payroll Accounting report.
- Update the Access Request tool to remove Data Warehouse and SAS access.
- Modified HR configuration in the Access Request tool.
- Granted access to two commitment accounting reports to 487 PAAT users.

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Cross Functional

- Completed an upgrade to ConnectCarolina that applied the latest security patches and updated underlying application tools.
- Rolled out 2-Step Verification to protect employee data by requiring additional identity verification to view W-2s online.
- Supported the OSR project close-out initiative by creating additional reports and notifications.
- Enhanced the Direct Labor Expense Reports for PAAT.
- Updated the GreyHeller firewall software with a new Windows fix.
- Added a new document type for the checklist update script for ImageNow administrators.
- Made accessibility improvements.

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