



ConnectCarolina 2018 User Conference

The New Faculty Portal

*Presenter: Scott Jackson
Director of Business Intelligence*



Making the connections

Welcome





Agenda:

- Overview
- Background
- Demonstration
- What's next for you?
- Final Questions



Overview

- The Faculty Portal is a comprehensive set of portlets intended to provide faculty with “one-stop-shop” capability
- The initial phase was implemented as a foundational solution with future phases providing additional functionality
- A team was formed to examine various portal options and the recommendation was to utilize PeopleSoft’s “fluid” technology. (LifeRay and LookingGlass were leading contenders)
- The Faculty Information Technology Advisory Council (FITAC) provided input, guidance and direction for the development and implementation of the portal

The screenshot displays the UNC Faculty Portal interface. On the left is a sidebar with navigation links: UNC Links, SelfService, Student Administration, Teaching Resources, Research Resources, Finance, HR/Payroll, General Links, Enterprise Reporting, My Links, and Status/Notifications. The main content area is divided into several portlets: Finance (with sub-tabs for PI Dashboard and Grants), Teaching (with sub-tabs for Faculty Center and Pending Incomplete), and Personal Folder (with sub-tabs for My Salary Sources and Personal Faculty Documents). The Finance portlet shows a table of awards with columns for Award, Project, Project Description, Total Award Amount, and Direct Balance. The Teaching portlet shows a table of teaching assignments with columns for ID, INLS, Room, Date, Tools for Info Literacy, Enrolled, and Time. The Personal Folder portlet shows a table of salary sources with columns for Fund, Dept ID, Account, Source, Desc, Program, Project ID, Funding End Date, Amount, and Total. On the right side of the interface is an Index section with links to Research (2), HR (0), Finance (0), Help and Support, Report List, and HR Reports.



Goals and Objectives

One stop shop!
PeopleSoft + other
applications

- Research-specific applications
- Teaching-specific applications

Increase efficiency/
reduce frustration

Less clicks!
Reduce navigation to
“deep links”

Technical requirements

- Utilize delivered tools (not custom write what can be done in 8.55 Tools)
- Move toward Fluid
- Improved UI!!
- Keep Performance in mind!



5,000

- The Faculty Portal has been implemented to more than 5,000 users across the campus.



**2014–
2015**

- Office of Sponsored Research IT examines requirements of a Faculty portal. Other priorities slowed this effort.

**Feb
2017**

- Funding is allocated, and a vendor (Ciber) is selected to help with development.

**Apr–
Oct
2017**

- Work on the original scope is completed.

**Nov
2017**

- Soft Launch for very small group of faculty.

**Q1 – Q2
2018**

- Faculty Portal is rolled out to the majority of faculty across campus.

Q3 2018

- Remaining faculty receive the Faculty Portal.



Requirements gathering – many faculty interviewed

Phase One

- Delesha Carpenter – Assistant Professor, Pharmaceutical Outcomes and Policy, Pharmacy
- Lee Graves – Associate Professor, Pharmacology
- Liza Makowski – Assistant Professor, Nutrition,
- Gary Cuddeback – Associate Professor, Social Work
- Chris Barker – Research Associate Professor Genetics





Requirements gathering – many faculty interviewed

Phase Two

School of Pharmacy

- Adam Persky - Clinical Associate Professor (ESOP)

College (recommended by Tammy McHale and Andy Johns)

- Marcey Waters – Professor Chemistry
- Charlie Kurzman – Professor Sociology
- Todd Taylor – Professor English and Comp Literature

FITAC (recommended by Jim Porto)

- Mark Holmes - Associate Professor, Health Policy
- Cal Lee - Sch of Inform and Libr Science

OSR (recommended by Andy Johns)

- Kurt Ribisl – Professor Health Behavior
- Wendy Brewster – Director - Womens Health Research Ctr
- Tom Shea - Director, Bone Marrow Transplant Program
- Mike Jay - Distinguished Professor/ Exec. Vice Dean (ESOP)

Recommended by Chris Kielt

- Paul Jones - Clinical Prof./Dir. of Metlab, Media and Journalism

Chris Derickson – Registrar

- Diane Pozefsky – Research Professor Computer Science



Requirements gathering – finalize functionality

- Display current and accurate grant information
- Provide a transaction summary that impacted the account – **later phase**
- Provide a way for the administrators to upload document(s) for the Faculty members to view
- Display the Faculty member's current salary sources
- Provide a common inbox across applications like RAMSeS, IRBIS, AIR, etc.
- Provide a forms repository of the most common Faculty forms
- Capability to upload Biosketch, CV, Teaching statement, etc.
- Access to the Instructor Grading Patterns report - **eliminated**
- Display a list of the "Incompletes Pending"
- Display the class roster



Features








-  SelfService
-  Student Administration
-  Finance
-  HR/Payroll
-  Enterprise Reporting
-  General Links
-  Teaching Resources
-  Research Resources

Announcements



My Worklist 

My Worklist

DAILY STATUS



ConnectCarolina



InfoPorte

Last Month Close - **January**

Status: Normal

Status: Normal

[Month-End Accounting Deadlines](#)

Wednesday, Feb 28, 1:00 PM: **Dell ePro vendor catalog is currently unavailable:** We are working with the vendor to resolve. We appreciate your patience and we will update this message when the issue is resolved.

FRIDAY, MARCH 2, 5:00 pm – MONDAY, MARCH 5, 7:00 am. There will be a maintenance outage affecting all of ConnectCarolina including Finance, HR/Payroll and Student Admin components of ConnectCarolina. For additional information on the specific system impacts, visit the [HR/Payroll Upgrade](#) page on CCinfo.

Firefox v58.1. There is a known cursor placement issue with Firefox v58.1 in the following environments: HR, Student Administration and Finance using Windows 7, 8 or 10. If you use the Tab key after clicking OK for any error/warning pop-up message, the cursor jumps to the Home link on the top of the page. The Tab key then follows all the portal links, etc.. It is recommended that you use your mouse rather than the Tab key to move the cursor back to the field you were working in before the error message.

Undergraduate Faculty: The Academic Progress Reporting period is now open for Spring 2018. Please share feedback with your undergraduate students in ConnectCarolina by Thursday, March 29, 2018. For more information, visit <http://studentsuccess.unc.edu/for-faculty/>. For streamlined access to your class roster, photo roster, and academic progress reports, select "Student Administration" from the left menu, and click on "My Schedule."

General Information

Beware of Multiple Phishing Attempts: Do not respond or click on links in these emails. [Attach the phishing emails](#) to a new email and send to phish@unc.edu. Visit <https://its.unc.edu/phish-alerts/> to see reported and confirmed phish attempts.

VPN Access Requires 2-Step: If you plan to work off-campus, you need the extra security provided by VPN and 2-Step Verification. If you need to install VPN, go to <https://help.unc.edu/help/vpn-installation-and-clients>. To learn more about 2-Step Verification, go here: [2-Step Verification](#)

Accessing TIM with Firefox: If you are using Firefox as your browser and have issues accessing TIM, please add the Shockwave Flash plug-in. Step-by-step directions are available [here](#).

Potential Printing Issues: Windows 7 or 8 users may experience issues printing from ConnectCarolina using Internet Explorer. It is recommended to print using print preview, or use Firefox or Chrome. For additional information, click [here](#).

Log in From Landing Page: If you approve transactions in ConnectCarolina, be sure to log in to ConnectCarolina using the green button on the ConnectCarolina landing page. Don't use the link in the message to protect yourself from phishing attempts.

Issues with Viewing Signatures in Mozilla Firefox: Learn more [here](#).

Agreeing to the Terms of Use

Everyone who has an administrative role in ConnectCarolina or who uses InfoPorte needs to agree to the Terms of Use. You can click the **Terms of Use** link under Self Service, or if you are getting administrative access in ConnectCarolina, you can wait for that access to be given. When it is, you'll see a message the next time you sign in, and you can read and agree to the Terms of Use from that message. If you do not agree to the Terms of Use, you will be blocked from using ConnectCarolina and InfoPorte.



UNC Links



SelfService



Student Administration



Teaching Resources



Research Resources



Finance



HR/Payroll



General Links



Enterprise Reporting



My Links



Status/Notifications



- 🔴 Last Month Close
- 🟡 InfoPorte
- 🟢 ConnectCarolina

- May Month-end close
- Attention ePro Users
- Important reminder for finance users
- Month End Close - June
- Fall Class Starts
- Open Enrollment

Finance



PI Dashboard

Grants

📈 02

📉 00

Visit InfoPorte ➔

Award	Project	Project Description	Total Award Amount	Direct Balance
BitCurator NLP	5105994	BitCurator NLP	\$750,000.00	\$176,167.04
INTEREST FOR 51059945105995		INTEREST FOR 5105994	\$0.00	\$0

View All

Download All

Teaching



Faculty Center

Pending Incomplete

[2017 Summer I](#) 2017 Summer II

1004	INLS 161-001 Cobb Hall - Rm 0021	TOOLS FOR INFO LITERACY 05/17/2017-06/22/2017	Enrolled:1 MTWTHF: 10:00 AM-11:30 AM
1005	INLS 203-001 Bondurant Hall - Rm 2030	HUMAN INFORMATION BEHAVIOR 05/17/2017-06/22/2017	Enrolled:1 TTH: 02:00 PM-03:15 PM

Personal Folder



My Salary Sources

Personal Faculty Documents

Fund	Dept ID	Account	Source	Descr	Program	Project ID	Funding End Dt	Amount	Total_Pct
No Results found.									

Inbox



Research (2)

+

HR (0)

+

Finance (0)

+

Help and Support



Report List



HR Reports

+

PI Dashboard



02 00

Award	Total Award Amount	Project	PI Name	Project Description	Project Status	Sponsor ID - Name	Project Begin Date	Project End Date	Direct Budget	Direct Expense	Pre-Enc / Encumbrance	Payroll Projection	Adjusted Direct Expense	Direct Balance
BitCurator NLP	\$750,000.00	5105994	Lee, Christopher A	BitCurator NLP	Open	13199 - Andrew W Mellon Foundation	10/1/2016	9/30/2018	\$750,000.00	\$290,733.43	\$0.00	\$283,099.53	\$573,832.96	\$176,167.04
INTEREST FOR 5105994	\$0.00	5105995	Lee, Christopher A	INTEREST FOR 5105994	Open	17321 - UNC-CH Interest Account	10/1/2016	9/30/2018	\$0	\$0	\$0.00	\$0	\$0	\$0

Close

General Links

Enterprise Reporting

My Links

Status/Notifications

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Teaching

Faculty Center Pending Incomplete

2017 Summer I 2017 Summer II

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	Cobb Hall - Rm 0021	05/17/2017-06/22/2017	MTWTHF: 10:00 AM-11:30 AM
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Personal Folder

My Salary Sources Personal Faculty Documents

Fund	Dept ID	Account	Source	Descr	Program	Project ID	Funding End Dt	Amount	Total_Pct
No Results found.									

HR Reports



Infoporte - Test System



[Dashboard](#) [Home](#) [School Info](#) [FAQ](#) [Find Order or Request](#)

[PI Dashboard](#) [Project Report](#)

Sponsored Project Financial Report



Report Date 10/4/2017
 Report Period 10/1/2016 - 9/30/2018
 Award Title BitCurator NLP
 Award (Ramses Project #) A17-0535
 Project Title BitCurator NLP
 PeopleSoft Project ID 5105994
 Sponsor Name Andrew W Mellon Foundation
 Award Reference # 31600663
 Principal Investigator Lee, Christopher A

Expenditures

Budget Line Categories	Budget	Expense	Pre-Enc / Encumbrance	Payroll Projection	Balance Available	MTD Expense
Salaries	491,565.00	194,938.27	0.00	222,363.57	74,263.16	0.00
Fringe Benefits	117,979.00	53,569.16	0.00	60,735.96	3,673.88	0.00
Total Personnel	609,544.00	248,507.43	0.00	283,099.53	77,937.04	0.00
Consultant-Contracted Services	20,000.00	4,084.50	0.00	0.00	15,915.50	0.00
Supplies	9,998.00	13,484.99	0.00	0.00	-3,486.99	0.00
Travel-Domestic	45,929.00	4,902.11	0.00	0.00	41,026.89	0.00
Travel-Foreign	0.00	4,090.76	0.00	0.00	-4,090.76	0.00
Computer Services	21,335.00	0.00	0.00	0.00	21,335.00	0.00
Equipment	0.00	7,507.32	0.00	0.00	-7,507.32	0.00
Trainee-Other	0.00	1,427.60	0.00	0.00	-1,427.60	0.00
Participant Costs	30,828.00	3,153.43	0.00	0.00	27,674.57	0.00
Miscellaneous Expense	12,366.00	3,575.29	0.00	0.00	8,790.71	0.00
Total Other	140,456.00	42,226.00	0.00	0.00	98,230.00	0.00
Total Direct Costs	750,000.00	290,733.43	0.00	283,099.53	176,167.04	0.00

UNC Links

SelfService

Student Administration

Teaching Resources

Research Resources

Finance

HR/Payroll

General Links

Enterprise Reporting

My Links

Status/Notifications

- Last Month Close
- InfoPorte
- ConnectCarolina

- May Month-end close
- Attention ePro Users
- Important reminder for finance users
- Month End Close - June
- Fall Class Starts
- Open Enrollment

Finance

PI Dashboard Grants

02 00 Visit InfoPorte

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View All Download All

Teaching

Faculty Center Pending Incomplete

2017 Summer I 2017 Summer II			
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Personal Folder

My Salary Sources Personal Faculty Documents

Fund	Dept ID	Account	Source	Descr	Program	Project ID	Funding End Dt	Amount	Total_Pct
No Results found.									

Inbox

- Research (2)
- HR (0)
- Finance (0)

Help and Support

Report List

- HR Reports

Class Roster

Tools for Information Literacy (Lecture)

Days and Times	Room	Instructor	Dates
MoTuWeThFr 10:00AM-11:30AM	Cobb Hall - Rm 0021	CHRISTOPHER LEE	05/17/2017 - 06/22/2017

*Enrollment Status Enrolled

Enrollment Capacity 50 Enrolled 1



[View FERPA Statement](#)

[Academic Progress Report](#)

[Roster with Pictures](#)

Select display option: ☒ Link to Photos ☐ Include photos in list

Enrolled Students						
Find First 1 of 1 Last						
	Notify	Photo	ID	Name	Units	Program and Plan
1			730083582	Thompson Jessica Ann	3.00	AS Bachelor - Pharmacy

[Select All](#) [Clear All](#)

[Printer Friendly Version](#)

[notify selected students](#)

[notify all students](#)

Close

Status/Notifications

- Last Month Close
- InfoPorte
- ConnectCarolina

May Month-end close

Attention ePro Users

Important reminder for finance users

Month End Close - June

Fall Class Starts

Open Enrollment

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	Bondurant Hall - Rm 2030	05/17/2017-06/22/2017	TTH: 02:00 PM-03:15 PM

Personal Folder

My Salary Sources

Personal Faculty Documents

	test document	09/01/2017	
	Another document	09/01/2017	

Upload Document

UNC Links

SelfService

Student Administration

Teaching Resources

Research Resources

Finance

HR/Payroll

General Links

Enterprise Reporting

My Links

Status/Notifications

- Last Month Close
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Finance

PI Dashboard Grants

02 00

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View All Download All

Teaching

Faculty Center Pending Incomplete

ID	Career	Term	Class Nbr	Grade	Grade In	Section	Subject	Catalog	ID	Role
No Results found.										

Personal Folder

My Salary Sources Personal Faculty Documents

test document	09/01/2017
Another document	09/01/2017

Upload Document

Inbox

Research (2) +

HR (0) +

Finance (0) +

Help and Support

Report List

HR Reports +

UNC Links

SelfService

Student Administration

Teaching Resources

Sakai

Academic Calendar

ITS Help Desk

Undergraduate Catalog

Student Wellness

Student Advising and Support

Research Resources

Finance

HR/Payroll

General Links

Enterprise Reporting

My Links

Status/Notifications

- Last Month Close
- InfoPorte
- ConnectCarolina

May Month-end close

Finance

PI Dashboard

Grants

02 00

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View All

Download All

Teaching

Faculty Center

Pending Incomplete

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No Results found.										

Personal Folder

My Salary Sources

Personal Faculty Documents

test document	09/01/2017	
Another document	09/01/2017	

Upload Document

Inbox

Research (2)

HR (0)

Finance (0)

Help and Support

Report List

HR Reports

Add/Delete Links



Add your Custom Links with a Description. Also, set the Active Flag, whether to turn on/off the links from displaying.

Personalize Find				First	1-5 of 5	Last
Description	URL	Active				
1 ESPN	http://www.espn.com	<input checked="" type="checkbox"/>				
2 Google	http://www.google.com	<input checked="" type="checkbox"/>				
3 UNC	http://www.unc.edu/	<input checked="" type="checkbox"/>				
4 UNC Chapel Hill	http://www.unc.edu/	<input checked="" type="checkbox"/>				
5 UNC-General Administration	https://www.northcarolina.edu/	<input checked="" type="checkbox"/>				

Save

Close

Personal Folder



My Salary Sources

Personal Faculty Documents



test document

09/01/2017



Another document

09/01/2017



Upload Document

UNC Links



SelfService



Student Administration



Teaching Resources



Research Resources



Finance



HR/Payroll



General Links



Enterprise Reporting



My Links



Status/Notifications



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Finance



PI Dashboard

Grants

📈 02 📉 00

Visit InfoPorte ➔

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Download All

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Personal Folder



My Salary Sources

Personal Faculty Documents

Fund	Dept ID	Account	Source	Descr	Program	Project ID	Funding End Dt	Amount	Total_Pct
No Results found.									

Inbox



Research (2)

+

HR (0)

+

Finance (0)

+

Help and Support



Report List



HR Reports

+

UNC Links

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Academic Progress Reporting Period
Now Open

Welcome to Faculty Portal

Research Projects

PI Dashboard

Grants

Project ID	Project Description	Project End Date	Direct Balance
------------	---------------------	------------------	----------------

No results found.

Teaching

Faculty Center

Pending Incomplete

You do not have any classes at this time.

Personal Folder

Inbox

Research (1)

RAMSES (1)

PROPOSAL CERTIFICATION (1)

Help and Support

Report List

Proposal Dashboard

- [Start New Proposal](#)
- [My Proposals](#)
- [Proposals In My Dept](#)
- [Financial Guarantee Inbox](#)

Award Dashboard

- [My Awards](#)
- [Awards In My Dept](#)
- [Closeout Submissions](#)

Certifications/Approvals

- [PI Certification Inbox](#)
- [Dept Approval Inbox](#)

Office of Sponsored Research
104 Airport Drive
Suite 2200, CB 1350
Chapel Hill, NC 27599-1350
Phone: 919.966.3411
Fax: 919.962.5011

Proposal Routing Status

Proposal No: [11-5131](#) (coversheet) 424 Sponsor: Department of Health and Human Services (DHHS)

Lead Investigator: [John Stephenson](#) Prime Sponsor:

Deadline: 7/01/2011 New Electronic: No

Proposal Specialist: Sponsored Projects Specialist: [Esther Thompson \(29\)](#)

Primary Award Contact: PS Project ID Manager: [Beverly Wyrick, John Stephenson](#)

Project Title: Test Proposal from John (please ignore)

[View IPF](#) [Certify Proposal](#)

[Approvals](#) [Compliance](#) [Status History](#) [Financial Guarantee](#) [Awards](#) [Events](#) [Notes](#) [Attachments](#)

The above proposal has been successfully submitted. All lead/principal investigators and approving departments listed below have been notified and should electronically authorize (in routing order for departments) this proposal before it is received by the Office of Sponsored Research.

Investigator(s) who must certify this Proposal

Investigator	Role	Decision
Scott Jackson	Principal Investigator	Not Yet Reviewed
John Stephenson	Lead Principal Investigator	Not Yet Reviewed

Department(s) that must authorize this proposal

Order	Department	Authorizing Person(s)	Authorizing Decision
1	Graduate School	Beverly Wyrick , John Stephenson	Not Yet Reviewed
2	Office of the Executive Vice Chancellor and Provost - Provost Administration	Wendy Andrews , Wendy Andrews , Barron Matherly , Barron Matherly , Gordon Joyner , Gordon Joyner , Karen Stone , Karen Stone	Not Yet Reviewed
2	Office of the Vice Chancellor for Research	Terry Magnuson , Andy Johns , Joann Gustafson , Tonya Watkins , Bridget Riordan	Not Yet Reviewed
	Office of Sponsored Research	Admin Office	

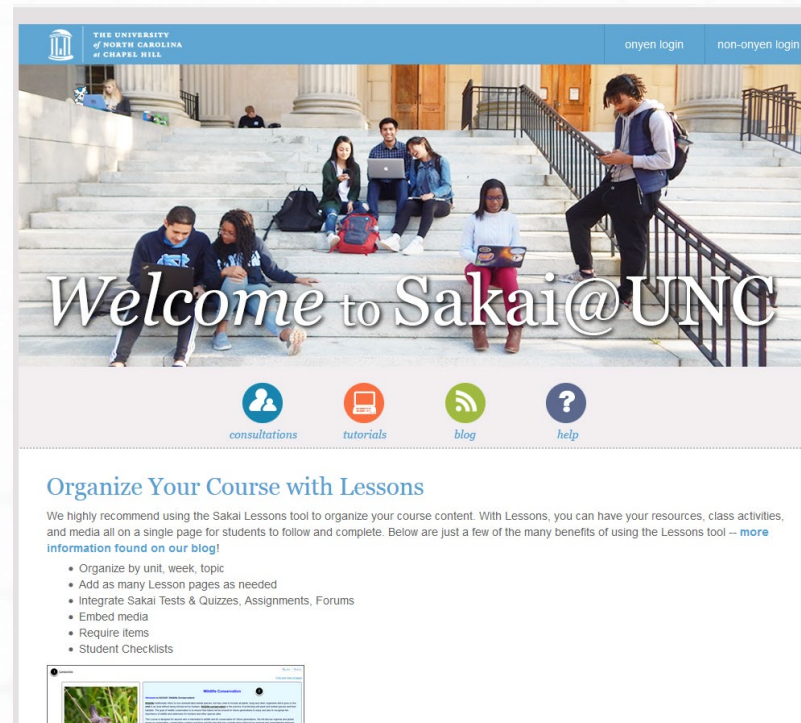
Status History

Status	Person	Date
Changed to: Funded	Changed by: Martisha Wallace	2/28/2013 11:12 AM
Changed to: Submitted	Changed by: Martisha Wallace	2/28/2013 11:09 AM
Changed to: Proposal Approved	Changed by: Martisha Wallace	2/28/2013 11:09 AM



For the Faculty Portal

- Based on additional meetings with faculty:
 - Deeper integration with Sakai:
 - Quick access to grade books
 - Quick access to syllabus and class materials
 - Additional navigations points within Sakai

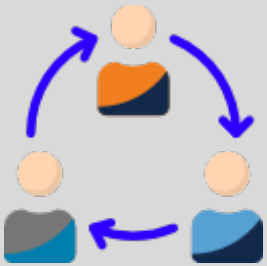




For the Campus users

- New user interface utilizing the technology used for the Faculty Portal
 - This will include a variety of new portlets
- New look-and-feel within the major components like HR, Finance, Student





Thank You for Your Participation!





Requirements gathering – finalize functionality

Provide a Faculty Portal One-Stop-Shop	Combined Worklists	Reporting Repositories	Global and User Defined Navigation	Displaying of Grant Data
Display everything that Faculty members will need in one place in an easy-to-use and engaging experience.	Display combined PS HR/Finance and 3 rd Party worklist items	<ul style="list-style-type: none">• Access to secured HR, CS, and FS queries and reports.• Quick delivery of Query/Report data.	<ul style="list-style-type: none">• Predefined navigation to transactions and links• Allow users to add their own custom links	Retrieve faculty grant data from 3 rd party application



Features





Requirements gathering – finalize functionality

Faculty Document Repository	Displaying of Faculty Schedules	Help and Support Documentation	Status and Notifications	Important Dates and Events
Provide the ability for faculty members to manage their own document repository and allow faculty admins to publish documents to them.	Retrieve faculty teaching schedules from Campus Solutions and provide easy access (deep link) to class transactions.	Provide quick access to needed documentation, links, and FAQs.	Display the health of UNC applications and news articles.	Display any important upcoming dates for faculty members.



Features

