UNC
COLLEGE OF ARTS & SCIENCES

Business Operations

ConnectCarolina & InfoPorte
Access Lunch & Learn Presentation

Title

Access Requests Submitted via InfoPorte

Finance Roles

- Finance Applications
- Web Travel
- P-Card
- Surplus Property Management

InfoPorte

- Faculty & Student reporting
- Finance & Budget
- HR Reporting & Requests
- PI Dashboard

HR/Payroll Systems

- ConnectCarolina HR & Payroll
- LawLogix
- CastleBranch
- PeopleAdmin

Student Administration

- SLATE
- Admissions
- Student Financials
- Student Records
- GradStar
- GSHIP

How Do I get Access To?

- Computer Billing Management (CBM)
  - Automatic for Managers
  - Email Joy Montemorano for others
- Common Authorization Tool (CAT)
  - Automatic for Managers
- Arts & Sciences Reporting (ASR)
  - Automatic for Managers
  - Email Joy Montemorano for others
- Manager Listserv
  - Automatic for Managers (only available to managers)
- Workflow Config
  - For non Accounting Srvcs Depts. only
  - Managers added automatically
  - Manger can add & edit users
- ConnectCarolina Finance Roles
- HR/Payroll Systems
- InfoPorte
  - Submit via InfoPorte
    - Finance Tab ➡ Financial Request ➡ Miscellaneous Accounting ➡ College Access Request
- RAMSeS & Backbone
  - Dept role manager can update users. (To change role managers, submit an authorization form for the desired application: RAMSeS form ~ Backbone form
- Listserv Management
- TIM Administrator
  - Sign-up classroom training @ finance.unc.edu
  - Submit enrollment form to Kristen Dunivant after training class
- SAS Reports
  - Automatic for Managers
  - Email Joy Montemorano for others
- Surplus Property Management
  - Submit a CC Finance Request in InfoPorte
  - Include a SPMS Registration Form w/ Request

TIM Administrator Access

TIM Administrator access is not managed by the Dean's Office

- Attend classroom training - sign up at finance.unc.edu ~ Training & Development
- Submit TIM Administrator Access Request Form

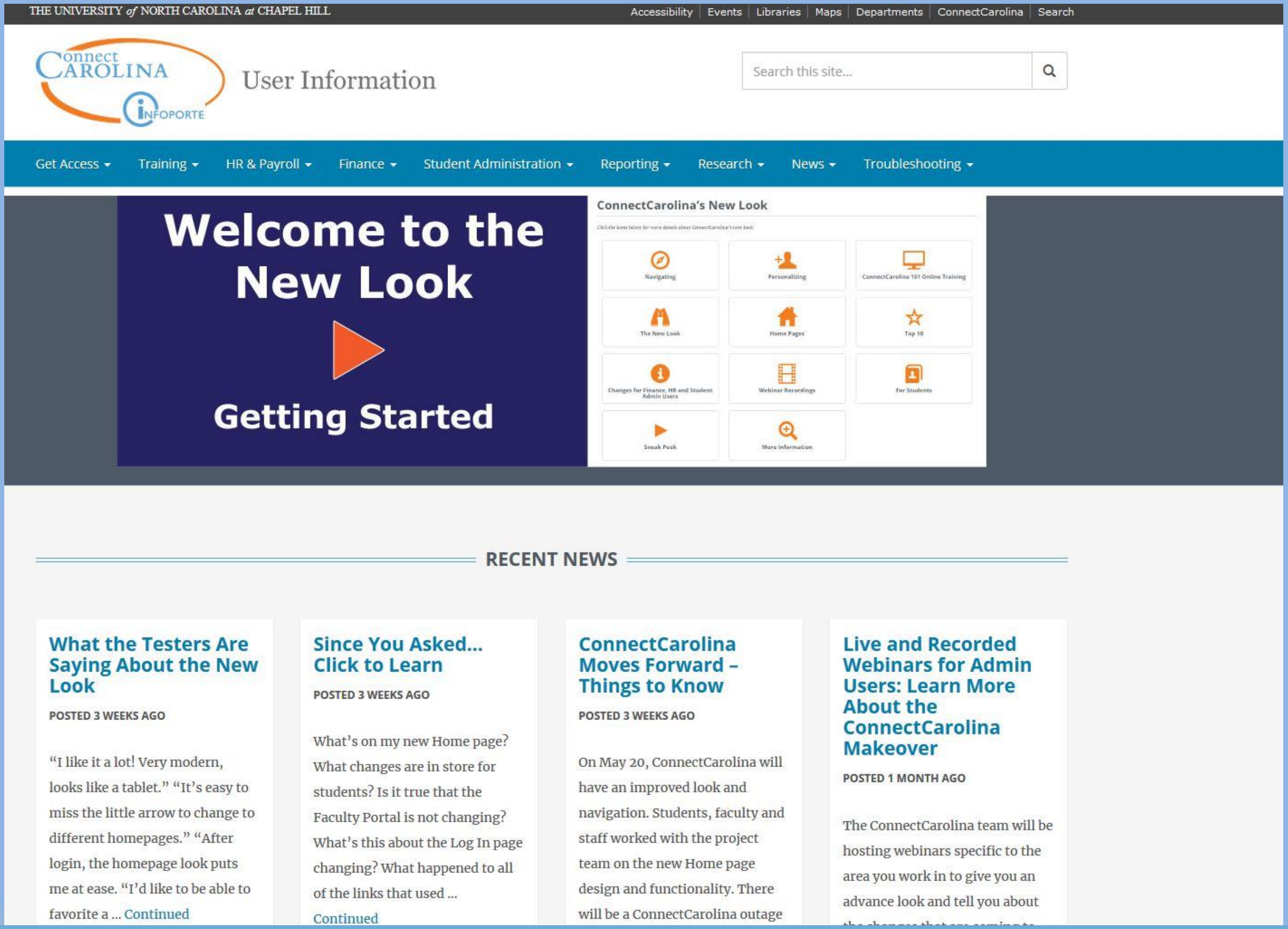
  to Kristen Dunivant .

Where can I get Information?

Visit ccinfo.unc.edu to:

- Find access forms
- See what trainings are required
  - Including "What access do I need?"
- Access computer based trainings (CBTs)
- Register for classroom trainings

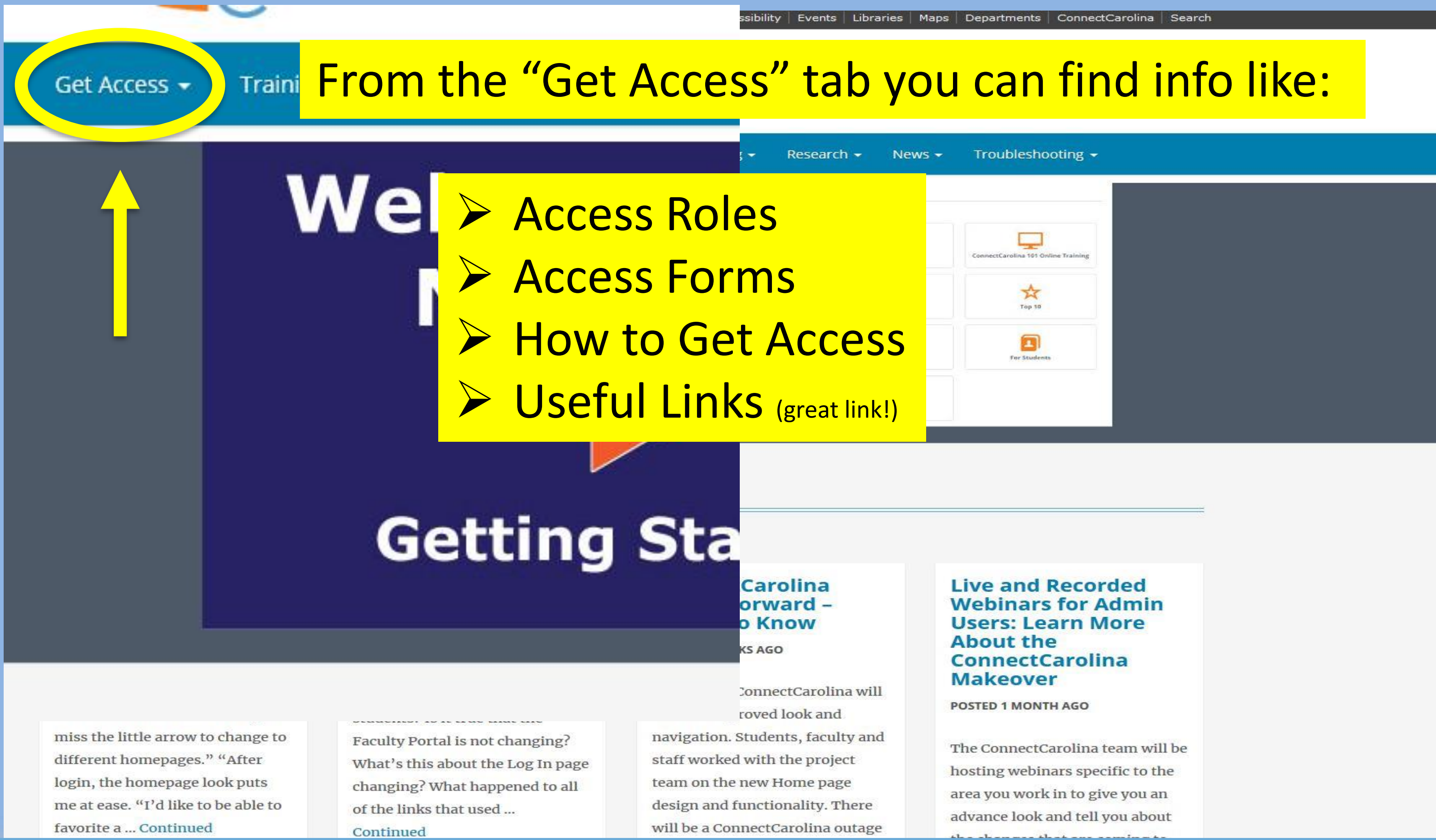
CCINFO Dashboard



cc.info.unc.edu

From the “Get Access” tab you can find info like:

- Access Roles
- Access Forms
- How to Get Access
- Useful Links (great link!)



ConnectCarolina InfoPorte

User Information

Search this site...

From "Get Access " → "Useful Links

Useful Links for Access

Below is a list of common links that you may need for getting access to ConnectCarolina a

Terms of Use →
Access Forms →
Register for a Class →
Training Requirements →
FERPA →

- Terms of Use agreement: ConnectCarolina login page
- Access Request Coordinators (ARCs) and InfoPorte Administrators: InfoPorte Admi
- List of Campus Unit Finance Leads (formerly called MOU leads): Campus Unit Finan
- Access forms for Finance, HR/Payroll, Student Admin, & ARC changes: Access forms
- Finance or Reporting classroom training: Register for a Class
- Student Administration training: Office of University Registrar Training Classes
- Computer based training environment: ConnectCarolina CBT login page
- List of roles with training requirements: Access Roles
- FERPA training: Office of the University Registrar
- HIPAA training: Coming Soon
- Need more help? http://help.unc.edu

InfoPorte Access Form

Use this form to request access to InfoPorte

Infoporte Access Request

Employee Information			
Name:		Phone #:	
PID:		ONYEN:	
Home Dept # and Name:			

Division or Dept Requesting Access to	
Division/Dept #'s and name(s):	

Cores			
Access to:			
☐ Consolidated Sales	☐ Core Edit	☐ Core Import	☐ FRS Feed Views

Infoporte Faculty

Access to:	Allows You To:
☐ Faculty Productivity	Access Faculty Activity Report, Curvita, and Faculty Details
☐ Faculty Report Views	Access the Faculty Review History
☐ Faculty Review	Perform actions upon Faculty requests and reviews
☐ Faculty Solicit	Solicit feedback on a Faculty request from an external person(s)
☐ TimeTrex	Access the third party TimeTrex system

Infoporte Finance

Access to:	Allows You To:
☐ Budget Reporting	Pull reports on the Financial Budgeting process
☐ Budget Requests	Place requests for Budget increases or reductions
☐ Finance Requests	Initiate actions in the Finance system
☐ Financial Reporting	View overview information for the Ledgers

Infoporte Access Form v8 06/28/19

Infoporte Dept Accounting

Access to:	Allows You To:
☐ Cost Code Edit	Create and edit Infoporte Cost Codes
☐ Cost Code Tagging	Tag Infoporte Cost Codes onto Transactions
☐ Soft Encumbrances	Enter, edit or remove Soft Encumbrances against available funds in the Finance system
☐ Journal Transactions	View detailed revenue and expense transactions
☐ Journal Rollup	View rolled up information for ledgers
☐ BMS Reports	Access the Budget Management System Reports

Infoporte HR

Access to:	Allows You To:
☐ Evaluations	Access review/evaluation process for employees
☐ Positions	View details of positions within the HR system
☐ Requests	Initiate or act upon HR actions in the Infoporte system
☐ Employee Views	View Employee information for the specified range of individuals or departments

Infoporte Home

Access to:	Allows You To:
☐ Dashboard	View project information for Principal Investigators (PIs). PIs will automatically receive access to the dashboard. Users who need access to specific PIs can request via the PI's PID(s): PIDs of PI(s) requesting access for:
☐ School Info	Access reports developed by individual schools or divisions.

For ***PI Dashboard*** access you'll need to submit list of PI names & PIDs

InfoPorte Access Form cont'd

Infoporte Inbox	
Access to:	**Allows You To:**
☐ Calendar Edit	Create and edit calendar entries
☐ Calendar View	View Calendar entries
☐ Request Lock	Employ the Lock capability on requests. Locking prevents further editing of a request. Unless unlocked, it may only be approved or disapproved
☐ Request Views	View requests in other inboxes

Infoporte Settings	
Access to:	**Allows You To:**
☐ Content Edit	Edit the content that displays under the School Info tab
☐ Group Edit	Create and edit groups used within workflow routes
☐ Route Edit	Create and edit workflow routes
☐ User Core Edit	Create and edit a Core
☐ User Edit	Perform Access Request Coordinator (ARC) tasks within Infoporte

Infoporte Student	
Access to:	**Allows You To:**
☐ Student Views	View the Term Enrollment, Degree Candidate and Degree Recipient reports
☐ Class Report	Access the Reports tab under the Student section
☐ Class Instructor Report	View this report
☐ Class Meeting Patterns – TBA Report	View this report
☐ Instructor Grading Patterns Report - View	View this report
☐ Class Instructor & Meeting Patterns Combined Rpt	View this report
☐ Class & Class Instructor Combined Report	View this report

Infoporte Tools	
Access to:	**Allows You To:**
☐ Contract Create	Create Contracts under the Contract tab
☐ Contract Edit	Edit existing Contracts
☐ Contract Invoices	Create Contract Invoices under the Contract tab
☐ Contract Lists	View the list of Contracts and Contract Details
☐ Data Dictionary Edit	Edit the Data Dictionary through the Data Dictionary tab in Infoporte
☐ Reserve Carolina Inn	Make reservations of University facilities within the Carolina Inn
☐ Reserve Parking	Reserve parking passes.
☐ Room	Reserve meeting rooms.
☐ Resource Edit	Edit reservations resources
☐ Source End Date	Receive email notifications about Faculty that are approaching this date
☐ Termination Date	Receive email notifications about Faculty that are approaching this date
☐ Visa End Date	Receive email notifications about Faculty that are approaching this date

Comments & Additional Information:

Authorization:			
Department Head Name:		Title:	
Signature:		Date:	

Infoporte Access Form v8 06/28/19

Who can sign this form?

Dept. Manager or Dept. Chair

CC Finance Applications

Updated 8/17/18

***Finance* ConnectCarolina and Related Applications Access Request Form**

Employee Information:			
Name:		Phone/email:	
PID #:		ONYEN:	
Home Dept. #:		Home Dept. Name:	
Manager Name/Title:		Manager Phone/email:	

	ConnectCarolina Campus User Roles [select those needed]
☐ Grant ☐ Revoke	**Budget Transfers*** –Allows the user to enter, modify, and search for budget transfers. It also allows the user to delete budget transfers that have not been posted and resubmit budget transfers for approval after they have been denied.
☐ Grant ☐ Revoke	**Budget Journals*** – Allows the user to enter, modify and search for budget journals. It also allows the user to delete budget journals that haven't been posted and to resubmit budget journals for approval after they have been denied.
☐ Grant ☐ Revoke	**Campus Vouchers*** – Allows the user to create campus vouchers for reimbursements for employees and University affiliates, independent contractor payments, cash advances, and petty cash replenishments. It also allows the user to use the Voucher Inquiry option to search for and display voucher information.
☐ Grant ☐ Revoke	**Creating and Changing Vendors*** – Allows the user to request new vendors and independent contractors, and request changes to existing vendors and independent contractors.
☐ Grant ☐ Revoke	**Journal Entries*** – Allows the user to create campus journals, correct campus journals, correct journal entries, correct voucher journal entries, and inter-unit campus journals. It also allows the user to edit campus journals that have not been posted and to delete campus journals.
☐ Grant ☐ Revoke	**Source Create**** – Allows the user to request new fund sources or request changes to fund sources. [This job function is also included in the Journal Entries role so there is no need to request this role in addition to the Journal Entries role.]
☐ Grant ☐ Revoke	**Managing Assets*** – Allows the user to enter an asset's location, including searching for and viewing an asset, updating information, and reporting movement and status.
☐ Grant ☐ Revoke	**Purchase Requisitions and Receiving*** – Allows the user to create purchase requisitions and make changes to them before they are submitted. It allows the user to view the status of, cancel, print, and make copies of requisitions. It also allows the user to create a change order. This role also allows the user to record receipts, make changes to receipts, handle returns, and close receipts short.
☐ Grant ☐ Revoke	**University Deposits*** – Allows the user to process incoming payments at the department or school level, using direct journal deposits. Also allows the user to update and view deposits.
☐ Grant ☐ Revoke	**Vendor Catalog**** – Allows the user to place orders in the eProcurement vendor catalogs (such

Finance Roles

Web Travel

P-Card*

Surplus Property Management*

*Supplemental forms required

Updated 8/17/18

	Web Travel - Campus
☐ Grant ☐ Revoke	**Web Travel User**** - allows someone to access Web Travel and create Travel Documents. It also grants Approvers access to the application.
☐ Grant ☐ Revoke	**Web Travel FRED Administrator**** - allows someone to set up workflow Approval Groups and Routes for departments.
	Web Travel – Central Office Only
☐ Grant ☐ Revoke	**Web Travel Travel Agent**** - allows a Travel Agent from one of the approved Travel Agencies access to the Travel Agent functions.
☐ Grant ☐ Revoke	**Web Travel All Departments Reporting**** - grants access to the reporting feature that allows generation of reports against all departments
☐ Grant ☐ Revoke	**Web Travel All GA Departments Reporting**** - grants access to the reporting feature that allows generation of reports against all GA departments
☐ Grant ☐ Revoke	**Web Travel Travel Office**** – grants access to the Travel Office functions.
☐ Grant ☐ Revoke	**Web Travel Application Administrator**** - allows a user to configure the established Web Travel business rules.
☐ Grant ☐ Revoke	**Web Travel System Administrator**** - grants super user access to all Web Travel functions.
	Purchasing Card (P-Card) – Campus **Note to ARC:** Upload the P-Card Application or the Account Maintenance Form with every P-Card request.
☐ Grant ☐ Revoke	**P-Card Accountholder*** - allows a P-Card Accountholder to access Works to allocate expenses, upload receipts, provide business justification and sign-off on transactions, as well as generate Accountholder activity reports.
☐ Grant ☐ Revoke	**P-Card Group Approver**** - allows the user to access Works to review, update, and provide final sign-off for P-Card transactions of Accountholders within their group.
☐ Grant ☐ Revoke	**P-Card Group Proxy Reconciler**** - allows a user to access Works to perform tasks on behalf of Accountholders within their group, as well as generate Accountholder activity reports.
☐ Grant ☐ Revoke	**P-Card Scoped Auditor**** - This role allows the user to access Works to create and manage reports of P-Card activity within their group.
	Purchasing Card (P-Card) – Central Office Only
☐ Grant ☐ Revoke	**Card Internal Auditor**** - grants access to the Reporting functions for all P-Cards in the system.
☐ Grant ☐ Revoke	**P-Card System Administrator**** - grants super user access to all P-Card functions.
	Surplus Property Management
☐ Grant ☐ Revoke	☐ **Administrator** ☐ **Manager** ☐ **User**

Special Data Level Access Needed:	
	Business units:
☐ View ☐ Edit	
☐ View ☐ Edit	
	Department numbers:
☐ View ☐ Edit	
☐ View ☐ Edit	

Please provide justification for foundation business unit access requests. This access must be approved by the authorized contact responsible for the foundation.

* Training is required for this role.

** Training is not required for this role; training materials and courses are available.

Authorization signifies that employee has a business need for the requested access.			
Dean/Department Head/HR Officer Name:		Title:	
Signature:		Date:	

For Access Request Coordinator Use Only:			
Entered by:		Date Entered:	

CC Finance Applications

Updated 8/17/18

Finance ConnectCarolina and Related Applications Access Request Form

Employee Information:			
Name:		Phone/email:	
PID #:		ONYEN:	
Home Dept. #:		Home Dept. Name:	
Manager Name/Title:		Manager Phone/email:	

	ConnectCarolina Campus User Roles [select those needed]
☐ Grant ☐ Revoke	**Budget Transfers*** –Allows the user to enter, modify, and search for budget transfers. It also allows the user to delete budget transfers that have not been posted and resubmit budget transfers for approval after they have been denied.
☐ Grant ☐ Revoke	**Budget Journals*** – Allows the user to enter, modify and search for budget journals. It also allows the user to delete budget journals that haven't been posted and to resubmit budget journals for approval after they have been denied.
☐ Grant ☐ Revoke	**Campus Vouchers*** – Allows the user to create campus vouchers for reimbursements for employees and University affiliates, independent contractor payments, cash advances, and petty cash replenishments. It also allows the user to use the Voucher Inquiry option to search for and display voucher information.
☐ Grant ☐ Revoke	**Creating and Changing Vendors*** – Allows the user to request new vendors and independent contractors, and request changes to existing vendors and independent contractors.
☐ Grant ☐ Revoke	**Journal Entries*** – Allows the user to create campus journals, correct campus journals, correct journal entries, correct voucher journal entries, and inter-unit campus journals. It also allows the user to edit campus journals that have not been posted and to delete campus journals.
☐ Grant ☐ Revoke	**Source Create**** – Allows the user to request new fund sources or request changes to fund sources. [This job function is also included in the Journal Entries role so there is no need to request this role in addition to the Journal Entries role.]
☐ Grant ☐ Revoke	**Managing Assets*** – Allows the user to enter an asset's location, including searching for and viewing an asset, updating information, and reporting movement and status.
☐ Grant ☐ Revoke	**Purchase Requisitions and Receiving*** – Allows the user to create purchase requisitions and make changes to them before they are submitted. It allows the user to view the status of, cancel, print, and make copies of requisitions. It also allows the user to create a change order. This role also allows the user to record receipts, make changes to receipts, handle returns, and close receipts short.
☐ Grant ☐ Revoke	**University Deposits*** – Allows the user to process incoming payments at the department or school level, using direct journal deposits. Also allows the user to update and view deposits.
☐ Grant ☐ Revoke	**Vendor Catalog**** – Allows the user to place orders in the eProcurement vendor catalogs (such as Staples, Fisher Scientific). Also allows the user to view the status of the requisitions with which these orders are placed and to make changes to those requisitions.
☐ Grant ☐ Revoke	**Inquiry Roles**** – Gives users access to the accounts payable, purchase order, budgets, accounts receivable, asset management, billing, general ledger, and eProcurement inquiry options.
☐ Grant ☐ Revoke	**Vendor Catalog View Only**** – Allows the user to view items in the eProcurement vendor catalogs (such as Staples and Fisher Scientific) but not place orders from the catalogs.
	ConnectCarolina Central Office
☐ Gr	

Who can sign this form?

Dept. Manager or Dept. Chair

Updated 8/17/18

	Web Travel - Campus
☐ Grant ☐ Revoke	**Web Travel User**** - allows someone to access Web Travel and create Travel Documents. It also grants Approvers access to the application.
☐ Grant ☐ Revoke	**Web Travel FRED Administrator**** - allows someone to set up workflow Approval Groups and Routes for departments.
	Web Travel – Central Office Only
☐ Grant ☐ Revoke	**Web Travel Travel Agent**** - allows a Travel Agent from one of the approved Travel Agencies access to the Travel Agent functions.
☐ Grant ☐ Revoke	**Web Travel All Departments Reporting**** - grants access to the reporting feature that allows generation of reports against all departments
☐ Grant ☐ Revoke	**Web Travel All GA Departments Reporting**** - grants access to the reporting feature that allows generation of reports against all GA departments
☐ Grant ☐ Revoke	**Web Travel Travel Office**** – grants access to the Travel Office functions.
☐ Grant ☐ Revoke	**Web Travel Application Administrator**** - allows a user to configure the established Web Travel business rules.
☐ Grant ☐ Revoke	**Web Travel System Administrator**** - grants super user access to all Web Travel functions.
	Purchasing Card (P-Card) – Campus **Note to ARC:** Upload the P-Card Application or the Account Maintenance Form with every P-Card request.
☐ Grant ☐ Revoke	**P-Card Accountholder*** - allows a P-Card Accountholder to access Works to allocate expenses, upload receipts, provide business justification and sign-off on transactions, as well as generate Accountholder activity reports.
☐ Grant ☐ Revoke	**P-Card Group Approver**** - allows the user to access Works to review, update, and provide final sign-off for P-Card transactions of Accountholders within their group.
☐ Grant ☐ Revoke	**P-Card Group Proxy Reconciler**** - allows a user to access Works to perform tasks on behalf of Accountholders within their group, as well as generate Accountholder activity reports.
☐ Grant ☐ Revoke	**P-Card Scoped Auditor**** - This role allows the user to access Works to create and manage reports of P-Card activity within their group.
	Purchasing Card (P-Card) – Central Office Only
☐ Grant ☐ Revoke	**Card Internal Auditor**** - grants access to the Reporting functions for all P-Cards in the system.
☐ Grant ☐ Revoke	**P-Card System Administrator**** - grants super user access to all P-Card functions.
	Surplus Property Management
☐ Grant ☐ Revoke	☐ **Administrator** ☐ **Manager** ☐ **User**

Special Data Level Access Needed:	
	Business units:
☐ View ☐ Edit	
☐ View ☐ Edit	
	Department numbers:
☐ View ☐ Edit	
☐ View ☐ Edit	

Please provide justification for foundation business unit access requests. This access must be approved by the authorized contact responsible for the foundation.

* Training is required for this role.
** Training is not required for this role; training materials and courses are available.

Authorization signifies that employee has a business need for the requested access.			
Dean/Department Head/HR Officer Name:		Title:	
Signature:		Date:	

For Access Request Coordinator Use Only:			
Entered by:		Date Entered:	

Pcard Access

One of these forms must accompany any Pcard related access request

New Card Application

THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

Bank of America Visa - Purchasing Card Enrollment Form

Institution Name: UNC-Chapel Hill

ACCOUNTHOLDER INFORMATION

Name on Card: (Accountholder)	(21 Characters)		
Billing Address:	(26 Characters)		
Billing City:	Billing State:	Billing Zip:	
Business Phone:	(919)		
Bus. Email Address:			
PID #:		ONYEN:	
Monthly Credit Limit:	$	Single Transaction Limit:	$

I agree to use this card for approved purchases only. I further understand that I may be personally liable for any funds misused with this card.

Accountholder Signature ____ Date / /

GROUP APPROVER FOR THIS ACCOUNT

(if additional space is needed, submit attachment with required information)

Name: ____ ONYEN: ____

Department: ____ No.: ____

Bus. Email Address: ____ Bus. Phone: (919) ____

Campus Mailing Address: ____

Business Unit: ____ **Fund:** ____ **Source:** ____ **Dept. ID:** ____

Program: ____ Cost Code 1: ____ Cost Code 2: ____ Cost Code 3: ____

Business Mgr/Department Head: ____ **(Signature)**

Print Name: ____ **Date:** ____

OPTIONAL

(if additional space is needed, submit attachment with required information)

Group Proxy Reconciler Name: ____ ONYEN: ____

Bus. Email: ____

Scoped Auditor Name: ____ ONYEN: ____

Bus. Email: ____

1252.1.1F – PURCHASING CARD APPLICATION REVISED 9/12/2018

Account Maintenance Form

THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

1252.1.2F UNC-CH Purchasing Card

Account Maintenance Form

For maintenance requests including SECTION d, send completed form to your Access Request Coordinator (ARC).

For all other maintenance requests (a, b, c, e, & f), send completed form directly to pcard@unc.edu.

Accountholder Name: ____ **Date:** ____

Department: ____ **Last Four Digits of Credit Card #:** ☐ ☐ ☐ ☐

Type of Request *(check all that apply)*

○ a. CANCEL CARD ACCOUNT *(a new Accountholder Agreement must be submitted to obtain a new card)*

○ b. CHANGE DEFAULT CHARTFIELD STRING *(confirm validity and budget of new CFS requested)*

From: ____ - ____ - ____ - ____ - ____ - ____ - ____ - ____
Bus. Unit, Fund, Source, Dept., Program, CC 1, CC 2, CC 3

To: ____ - ____ - ____ - ____ - ____ - ____ - ____ - ____
Bus. Unit, Fund, Source, Dept., Program, CC 1, CC 2, CC 3

○ c. CHANGE CREDIT LIMIT(S)

Monthly Credit Limit *($5,000, $10,000, $25,000, $35,000, or $50,000)* **From:** $____ **To:** $____

Single Transaction Limit *($500, $2,500, or $5,000)* **From:** $____ **To:** $____

○ d. UPDATE GROUP OFFICIALS *(if additional space is needed, submit attachment with required information)*

Group Approver

Add Name: ____ ONYEN ____

Bus. Email: ____

Delete Name: ____

Group Proxy Reconciler

Add Name: ____ ONYEN ____

Bus. Email: ____

Delete Name: ____

Scoped Auditor

Add Name: ____ ONYEN ____

Bus. Email: ____

Delete Name: ____

○ e. CHANGE CAMPUS MAILING ADDRESS

From: ____ **To:** ____

○ f. OTHER *(please specify)*: ____

Accountholder Signature ____

Bus Mgr./Dept. Head Signature ____

1252.1.2F - UNC-CH PURCHASING CARD ACCOUNT MAINTENANCE FORM REVISED: 9/12/2018

Pcard Account Maintenance Updates

THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

1252.1.2F UNC-CH Purchasing Card
Account Maintenance Form

For maintenance requests including SECTION d, send completed form to your Access Request Coordinator (ARC).
For all other maintenance requests (a, b, c, e, & f), send completed form directly to pcard@unc.edu.

Accountholder Name: ______

Department: ______ Last Four Digits of Credit Card #:

Type of Request *(check all that apply)*

- a. CANCEL CARD ACCOUNT *(a new Accountholder Agreement must be*
- b. CHANGE DEFAULT CHARTFIELD STRING *(confirm validity and b*
  - From: Bus. Unit - Fund - Source - Dept. - Program - CC 1
  - To: Bus. Unit - Fund - Source - Dept. - Program - CC 1
- c. CHANGE CREDIT LIMIT(S)
  - Monthly Credit Limit *($5,000, $10,000, $25,000, $35,000, or $50,000)* Single Trans
  - From: $ ______ To: $ ______ From: $
- d. UPDATE GROUP OFFICIALS *(if additional space is needed, submit atta*
  - *Group Approver*
    - Add Name: ______ ONYEN ______
    - Bus. Email: ______
    - Delete Name: ______
  - *Group Proxy Reconciler*
    - Add Name: ______ ONYEN ______
    - Bus. Email: ______
    - Delete Name: ______
  - *Scoped Auditor*
    - Add Name: ______ ONYEN ______
    - Bus. Email: ______
    - Delete Name: ______
- e. CHANGE CAMPUS MAILING ADDRESS
  - From: ______ To: ______
- f. OTHER *(please specify)*: ______

Accountholder Signature ______

Bus Mgr./Dept. Head Signature ______

1252.1.2F - UNC-CH PURCHASING CARD ACCOUNT MAINTENANCE FORM REVISED: 9/12/2018

THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

1252.1.2F UNC-CH Purchasing Card
Account Maintenance Form

For maintenance requests including SECTION d, send completed form to your Access Request Coordinator (ARC).
For all other maintenance requests (a, b, c, e, & f), send completed form directly to pcard@unc.edu.

Accountholder Name: ______ Date: ______

Department: ______ Last Four Digits of Credit Card #: ☐ ☐ ☐ ☐

- Submit only requests to update group officials (section"d") via InfoPorte.
- All other requests should be emailed directly to the Pcard office at pcard.unc.edu.

Surplus Property Management

Form must accompany SPMS request

UNC | FINANCE AND OPERATIONS Finance

604.1.1f -Surplus Property Management System (SPMS)
Department Initial Registration

If you are an administrator for more than one department, please submit one form per department number.

Date of Request: ____________________

DEPARTMENT INFORMATION

Department Number: __________________ Department Name: ____________________

Building Name: ____

Building Address: ____

____

Campus Box: ____

Phone Number: _________________________________ Fax Number: ___________________

Department Default Account Number for Surplus Warehouse Purchase: ____________________

Business Unit: ____________Fund: _____________Source: _____________ Department:_________________

PROFILE CONTACT INFORMATION

Name (as found in campus directory): ____

Title: ____

Email (as found in campus directory): ____

Phone Number: ____

Role (select one): ◯ USER ◯ MANAGER ◯ ADMINISTRATOR

_____________________________________ ____

Signature Supervisor Authorization - Signature

This form needs to be submitted along with the Access Request Form to your Access Request Coordinator (ARC) in your Department. A list of ARCs can be found at CC Info at: https://ccinfo.unc.edu/files/2017/03/Infoporte-Admin_Access-Request-Coordinator-list.pdf

HR Systems Access

- ConnectCarolina HR
- LawLogix
- CastleBranch
- PeopleAdmin

Roles allowed vary by department

HR/Payroll

REQUEST FOR HR SYSTEMS ACCESS - CAMPUS

Employee/User Information						
Last Name:		First Name:		MI:		
Department Number:		Department/School Name:		Phone:		CB:
Onyen:		PID:				
Working Title:		Email Address:				
Position Number:		Position Classification:				
UNC Healthcare employee:	☐ Yes ☐ No					
Is this person designated as an HR Represen… Departm…						

HR Acces…

☐ Conn…
☐ LawL…
☐ Castl…

Type of A…

Action R… Effective …

…ser

What Dep… do you ne… (Not nece… Student, … CastleBra…

Section A…

☐ HR Representative	☐ Paycheck Support*	☐ Person Update*	☐ CA Payroll Reports	☐ Other:
☐ Basic Originator	☐ Student Originator	☐ PAAT Basic	☐ PAAT Advanced	☐ PAAT Super

* *Users assigned to these roles must be a designated campus HR Representative or HR Officer*

ePAR APPROVER ROLES

Department Roles	Departments	School/Division Roles	Departments
☐ Level 1 HR Approver		☐ Level 2 HR Approver	
☐ Level 1 Budget Approver		☐ Level 2 Budget Approver	
☐ Level 1 Student Approver		☐ Level 2 Student Approver	
☐ Level 1 Student Reviewer		☐ Level 2 Student Reviewer	

HR/Payroll

REQUEST FOR HR SYSTEMS ACCESS - CAMPUS

SECTION B – LawLogix I-9 System *(Only permanent UNC-Chapel Hill employees can be granted access to LawLogix. Access should be limited to HR Representatives whenever possible. Role requires training prior to access being granted.)*

Role Requested: ☐ Department Originator

SECTION C – CastleBranch *(Only permanent UNC-Chapel Hill HR Representatives and select Business Office employees can be granted access to CastleBranch.)*

School/Division Name:

SECTION D – PeopleAdmin *(If you need historical department access, please include those department numbers in the Department Number section under Type of Access Requested.)*

☐ HR Representative**	☐ Department View
☐ Search Committee Editor	

APPROVAL ACCESS FOR PEOPLEADMIN ACTIONS

Department Approver Roles

☐ SHRA Department/Division Approver	☐ Department EEO Approver

School/College Approver Roles

☐ SHRA Department/Division Approver	☐ EHRA School/Division Approver

***Role requires user to attend training prior to access being granted.*

SECTION E – InfoPorte Human Resources

☐ Campus Views

Justification for Access:

DEPARTMENTAL SIGNATURES *(Required)*
Users cannot authorize their own access. Proxy signatures cannot be accepted.

User Signature:		Date:	
Supervisor Name: *(please print)*		Title:	
Supervisor Signature:		Date:	
HR Officer Name: *(please print)*		Title:	

Who signs this form?

1. Requested User
2. Supervisor or Dept. Manager
3. College HR Officer – Ashante Diallo

Submit request with first two signatures. Dean's Office will acquire HR Officer signature.

CC Student Administration

ConnectCarolina and Related Applications Access Request Tool
Student Administration

Employee Information:			
Name:		Phone / email:	
PID #:		ONYEN:	
Home Dept. #:		Home Dept. Name:	
Manager Name:		Manager Phone:	
Manager Title:		Manager email:	

****FERPA Training is required and verified for all Student Administration access****

ADMISSIONS

Slate application – Graduate/Professional	
☐Grant ☐Revoke	Search and view applications, add evaluation notes and decision recommendations, and run queries/reports. (Reader/Evaluator)
☐Grant ☐Revoke	All access of Reader/Evaluator **plus** create queries/reports, create communications, access to the audit log and interactions, and events/interviews scheduling. (Coordinator)
☐Grant ☐Revoke	All access of Coordinator **plus** move applications within evaluation bins, access to applicant inbox, and release admission decisions. (Director)
Applications Centers / Programs (required):	

ConnectCarolina Admissions Undergraduate

Access to undergraduate applications is limited to the admissions office. If you believe your position requires you to view applications, contact Undergraduate Admissions.

ConnectCarolina Admissions Graduate/Professional	
☐Grant ☐Revoke	View application and status in Application Maintenance, view and update application checklists, view application materials in WebNow. For student services managers responsible for supporting graduate or professional applicants. (Student Services Manager)
☐Grant ☐Revoke	View applications and status. (Applications Maintenance View Only)
☐Grant ☐Revoke	Update application status and enter decisions. (Application Maintenance) – NOTE: update access to this page is limited to the Graduate School or programs that administer their own programs.
Applications Centers / Programs (required):	

FINANCIAL AID

Access to ConnectCarolina Financial Aid is not available to campus users. If you feel that you have an access need for financial aid information, please contact that office directly.

STUDENT FINANCIALS

☐Grant ☐Revoke	View student financial information – Student Services Managers (External View Only)
☐Grant ☐Revoke	Post department charges to student accounts (Post Dept Charges) *Requires Student Financials training and a Service Level Agreement.*
☐Grant ☐Revoke	Post department charges to student accounts in batch (Post Dept Charges – Batch) *Requires Student Financials training and a Service Level Agreement.*
☐Grant ☐Revoke	View queries of charges billed through Cashier's Office (Dept Charges Query) *Requires Student Financials training and a Service Level Agreement.*
Department name and number (required):	

STUDENT RECORDS

Have you had ConnectCarolina access before? ☐ No ☐ Yes in ________________department

☐Grant ☐Revoke	View students' programs, plans, sub-plans, enrollments, and wait lists. (Student Records – View Only)
☐Grant ☐Revoke	Modify students' programs, plans and sub-plans; enroll/drop/swap single courses for students during open enrollment; enroll/drop students from a single course during the drop/add period; enroll/drop students from a single course after the registration period closes; work with overrides to process enrollments; view wait lists; cancel existing registrations or withdraw students for one or more terms; and term activate students. (Enroll/Withdraw Students) *Requires Student Records training class.*
☐Grant ☐Revoke	Create student blocks and course blocks, merge student blocks with course blocks, handle overrides for students in block-enrolled classes, retrieve the results of the block enrollment process, and search for previously-processed block enrollments. (Block Enroll Students) *Requires Student Records training class.*
☐Grant ☐Revoke	Access Tar Heel Tracker reports, submit adjustments to students' Tar Heel Tracker reports, and view previously-submitted adjustments for students. (Tar Heel Tracker) *Requires Student Records training class.*
☐Grant ☐Revoke	Schedule classes and make changes to previously scheduled classes during the course schedule maintenance window; enter reserve capacities, instructors, and notes; and change enrollment during the extended course schedule maintenance window. (Classroom Scheduling/Ad Astra)
☐Grant ☐Revoke	View scheduled classes. (Scheduling – View Only)
☐Grant ☐Revoke	Input comments and update the graduation status of degree candidates in the Graduation module in ConnectCarolina (Grad Tracker). For "graduation coordinators" (most commonly academic advisors) in each school or division. (Graduation Coordinator) *Requires Student Records training.*
☐Grant ☐Revoke	Approve grade roster of classes for which you are the primary instructor and access the online Grade Change Request page to initiate or approve grade changes. For primary instructors for a course. (Grade Approver) *Requires Student Records training class.*
☐Grant ☐Revoke	View student residency classification. (Residency – View Only)
☐Grant ☐Revoke	Update a student record with residency information. For Residency Determination Officers. (Residency – Classifier) *Requires Student Records training class.*
☐Grant ☐Revoke	Add approved users to the Instructor Table. (Add Instructor)
Department name and number (required):	
Other Information for Student Records access:	

OTHER

☐Grant ☐Revoke	Create PIDs in ConnectCarolina (PID Create) *Requires training provided by PID Office.*
☐Grant ☐Revoke	View awards entered into GradStar, the system used to pay non-service stipends, tuition, and fee awards to graduate students. (GradStar View Only) *Requires online training (CBT).*
☐Grant ☐Revoke	Enter awards into GradStar, the system used to pay non-service stipends, tuition, and fee awards to graduate students. (GradStar Campus User) *Requires online training (CBT).*
☐Grant ☐Revoke	PS Query access to GradStar User Queries.
☐Grant ☐Revoke	View graduate student enrollments in the Graduate Student Health Insurance Program (GSHIP). (GSHIP View Only) *Requires online training (CBT).*
☐Grant ☐Revoke	Enroll graduate students in the Graduate Student Health Insurance Program (GSHIP). (GSHIP Campus User) *Requires online training (CBT).*
Department name and number (required):	

Authorization signifies that employee has a business need for the requested access.

Dean/ Department Head/ HR Officer Name:		Title:	
Signature:		Date:	

For Access Request Coordinator Use Only:			
Entered by:		Date Entered:	

CC Student Administration

Connect CAROLINA

ConnectCarolina and Related Applications Access Request Tool
Student Administration

Employee Information:			
Name:		Phone / email:	
PID #:		ONYEN:	
Home Dept. #:		Home Dept. Name:	
Manager Name:		Manager Phone:	
Manager Title:		Manager email:	

****FERPA Training is required and verified for all Student Administration access****

ADMISSIONS

Slate application – Graduate/Professional	
☐Grant ☐Revoke	Search and view applications, add evaluation notes and decision recommendations, and run queries/reports. (Reader/Evaluator)
☐Grant ☐Revoke	All access of Reader/Evaluator **plus** create queries/reports, create communications, access to the audit log and interactions, and events/interviews scheduling. (Coordinator)
☐Grant ☐Revoke	All access of Coordinator **plus** move applications within evaluation bins, access to applicant inbox, and release admission decisions. (Director)
Applications Centers / Programs (required):	

ConnectCarolina Admissions Undergraduate

Access to undergraduate applications is limited to the admissions office. If you believe your position requires you to view applications, contact Undergraduate Admissions.

ConnectCarolina Admissions Graduate/Professional	
☐Grant ☐Revoke	View application and status in Application Maintenance, view and update application checklists, view application materials in WebNow. For student services managers responsible for supporting graduate or professional applicants. (Student Services Manager)
☐Grant ☐Revoke	View applications and status. (Applications Maintenance View Only)
☐Grant ☐Revoke	Update application status and enter decisions. (Application Maintenance) – NOTE: update access to this page is limited to the Graduate School or programs that administer their own programs.
Applications Centers / Programs (required):	

FINANCIAL AID

Access to ConnectCarolina Financial Aid is not available to campus users. If you feel that you have an access need for financial aid information, please contact that office directly.

STUDENT FINANCIALS

☐Grant ☐Revoke	View student financial information – Student Services Managers (External View Only)
☐Grant ☐Revoke	Post department charges to student accounts (Post Dept Charges) *Requires Student Financials training and a Service Level Agreement.*
☐Grant ☐Revoke	Post department charges to student accounts in batch (Post Dept Charges – Batch) *Requires Student Financials training and a Service Level Agreement.*
☐Grant ☐Revoke	View queries of charges billed through Cashier's Office (Dept Charges Query)
Department name and number (required):	

STUDENT RECORDS

Have you had ConnectCarolina access before? ☐ No ☐ Yes in ________________ department

☐Grant ☐Revoke	View students' programs, plans, sub-plans, enrollments, and wait lists. (Student Records – View Only)
☐Grant ☐Revoke	Modify students' programs, plans and sub-plans; enroll/drop/swap single courses for students during open enrollment; enroll/drop students from a single course during the drop/add period; enroll/drop students from a single course after the registration period closes; work with overrides to process enrollments; view wait lists; cancel existing registrations or withdraw students for one or more terms; and term activate students. (Enroll/Withdraw Students) *Requires Student Records training class.*
☐Grant ☐Revoke	Create student blocks and course blocks, merge student blocks with course blocks, handle overrides for students in block-enrolled classes, retrieve the results of the block enrollment process, and search for previously-processed block enrollments. (Block Enroll Students) *Requires Student Records training class.*
☐Grant ☐Revoke	Access Tar Heel Tracker reports, submit adjustments to students' Tar Heel Tracker reports, and view previously-submitted adjustments for students. (Tar Heel Tracker) *Requires Student Records training class.*
☐Grant ☐Revoke	Schedule classes and make changes to previously scheduled classes during the course schedule maintenance window; enter reserve capacities, instructors, and notes; and change enrollment during the extended course schedule maintenance window. (Classroom Scheduling/Ad Astra)
☐Grant ☐Revoke	View scheduled classes. (Scheduling – View Only)
☐Grant ☐Revoke	Input comments and update the graduation status of degree candidates in the Graduation module in ConnectCarolina (Grad Tracker). For "graduation coordinators" (most commonly academic advisors) in each school or division. (Graduation Coordinator) *Requires Student Records training.*
☐Grant ☐Revoke	Approve grade roster of classes for which you are the primary instructor and access the online Grade Change Request page to initiate or approve grade changes. For primary instructors for a course. (Grade Approver) *Requires Student Records training class.*
☐Grant ☐Revoke	View student residency classification. (Residency – View Only)
☐Grant ☐Revoke	Update a student record with residency information. For Residency Determination Officers. (Residency – Classifier) *Requires Student Records training class.*
Department name and number (required):	
Other Information for Student Records access:	

OTHER

☐Grant ☐Revoke	Create PIDs in ConnectCarolina (PID Create) *Requires training provided by PID Office.*
☐Grant ☐Revoke	View awards entered into GradStar, the system used to pay non-service stipends, tuition, and fee awards to graduate students. (GradStar View Only) *Requires online training (CBT).*
☐Grant ☐Revoke	Enter awards into GradStar, the system used to pay non-service stipends, tuition, and fee awards to graduate students. (GradStar Campus User) *Requires online training (CBT).*
☐Grant ☐Revoke	PS Query access to GradStar User Queries.
☐Grant ☐Revoke	View graduate student enrollments in the Graduate Student Health Insurance Program (GSHIP). (GSHIP View Only) *Requires online training (CBT).*
☐Grant ☐Revoke	Enroll graduate students in the Graduate Student Health Insurance Program (GSHIP). (GSHIP Campus User) *Requires online training (CBT).*
Department name and number (required):	

Authorization signifies that employee has a business need for the requested access.

Dean/ Department Head/ HR Officer Name:		Title:	
Signature:		Date:	

For Access Request Coordinator Use Only:			
Entered by:		Date Entered:	

Department name & number is required at the end of EACH requested section

CC Student Administration

ConnectCarolina and Related Applications Access Request Tool
Student Administration

Employee Information:			
Name:		Phone / email:	
PID #:		ONYEN:	
Home Dept. #:		Home Dept. Name:	
Manager Name:		Manager Phone:	
Manager Title:		Manager email:	

****FERPA Training is required and verified for all Student Administration access****

ADMISSIONS

Slate application – Graduate/Professional

☐Grant ☐Revoke	Search and view applications, add evaluation notes and decision recommendations, and run queries/reports. (Reader/Evaluator)
☐Grant ☐Revoke	All access of Reader/Evaluator **plus** create queries/reports, create communications, access to the audit log and interactions, and events/interviews scheduling. (Coordinator)
☐Grant ☐Revoke	All access of Coordinator **plus** move applications within evaluation bins, access to applicant inbox, and release admission decisions. (Director)

Applications Centers / Programs (required):

ConnectCarolina Admissions Undergraduate

Access to undergraduate applications is limited to the admissions office. If you believe your position requires you to view applications, contact Undergraduate Admissions.

ConnectCarolina Admissions Graduate/Professional

☐Grant ☐Revoke	View application and status in Application Maintenance, view and update application checklists, view application materials in WebNow. For student services managers responsible for supporting graduate or professional applicants. (Student Services Manager)
☐Grant ☐Revoke	View applications and status. (Applications Maintenance View Only)
☐Grant ☐Revoke	Update application status and enter decisions. (Application Maintenance) – NOTE: update access to this page is limited to the Graduate School or programs that administer their own programs.

Applications Centers / Programs (required):

FINANCIAL AID

Access to ConnectCarolina Financial Aid is not available to campus users. If you feel that you have an access need for financial aid information, please contact that office directly.

STUDENT FINANCIALS

☐Grant ☐Revoke	View student financial information – Student Services Managers (External View Only)
☐Grant ☐Revoke	Post department charges to student accounts (Post Dept Charges) *Requires Student Financials training and a Service Level Agreement.*
☐Grant ☐Revoke	Post department charges to student accounts in batch (Post Dept Charges – Batch) *Requires Student Financials training and a Service Level Agreement.*
☐Grant ☐Revoke	View queries of charges billed through Cashier's Office (Dept Charges Query) *Requires Student Financials training and a Service Level Agreement.*

Department name and number (required):

STUDENT RECORDS

Have you had ConnectCarolina access before? ☐ No ☐ Yes in ________________ department

☐Grant ☐Revoke	View students' programs, plans, sub-plans, enrollments, and wait lists. (Student Records – View Only)
☐Grant ☐Revoke	Modify students' programs, plans and sub-plans; enroll/drop/swap single courses for students during open enrollment; enroll/drop students from a single course during the drop/add period; enroll/drop students from a single course after the registration period closes; work with overrides to process enrollments; view wait lists; cancel existing registrations or withdraw students for one or more terms; and term activate students. (Enroll/Withdraw Students) *Requires Student Records training class.*
☐Grant ☐Revoke	Create student blocks and course blocks, merge student blocks with course blocks, handle overrides for students in block-enrolled classes, retrieve the results of the block enrollment process, and search for previously-processed block enrollments. (Block Enroll Students) *Requires Student Records training class.*
☐Grant ☐Revoke	Access Tar Heel Tracker reports, submit adjustments to students' Tar Heel Tracker reports, and view previously-submitted adjustments for students. (Tar Heel Tracker) *Requires Student Records training class.*
☐Grant ☐Revoke	Schedule classes and make changes to previously scheduled classes during the course schedule maintenance window; enter reserve capacities, instructors, and notes; and change enrollment during the extended course schedule maintenance window. (Classroom Scheduling/Ad Astra)
☐Grant ☐Revoke	View scheduled classes. (Sche
☐Grant ☐Revoke	Input comments and update t module in ConnectCarolina (commonly academic advisor (Graduation Coordinator) Re

☐Grant ☐Revoke	Approve grade roster of classes for which you are the primary instructor and access the online Grade Change Request page to initiate or approve grade changes. For primary instructors for a course. (Grade Approver) *Requires Student Records training class.*
☐Grant ☐Revoke	View student residency classification. (Residency – View Only)
☐Grant ☐Revoke	Update a student record with residency information. For Residency Determination Officers. (Residency – Classifier) *Requires Student Records training class.*
☐Grant ☐Revoke	Add approved users to the Instructor Table. (Add Instructor)

Department name and number (required):

Other Information for Student Records access:

OTHER

☐Grant ☐Revoke	Create PIDs in ConnectCarolina (PID Create) *Requires training provided by PID Office.*
☐Grant ☐Revoke	View awards entered into GradStar, the system used to pay non-service stipends, tuition, and fee awards to graduate students. (GradStar View Only) *Requires online training (CBT).*
☐Grant ☐Revoke	Enter awards into GradStar, the system used to pay non-service stipends, tuition, and fee awards to graduate students. (GradStar Campus User) *Requires online training (CBT).*
☐Grant ☐Revoke	PS Query access to GradStar User Queries.
☐Grant ☐Revoke	View graduate student enrollments in the Graduate Student Health Insurance Program (GSHIP). (GSHIP View Only) *Requires online training (CBT).*
☐Grant ☐Revoke	Enroll graduate students in the Graduate Student Health Insurance Program (GSHIP). (GSHIP Campus User) *Requires online training (CBT).*

Department name and number (required):

Authorization signifies that employee has a business need for the requested access.

Dean/ Department Head/ HR Officer Name:		Title:	
Signature:		Date:	

For Access Request Coordinator Use Only:

Who can sign this form?

Dept. Manager or Dept. Chair

Common Errors

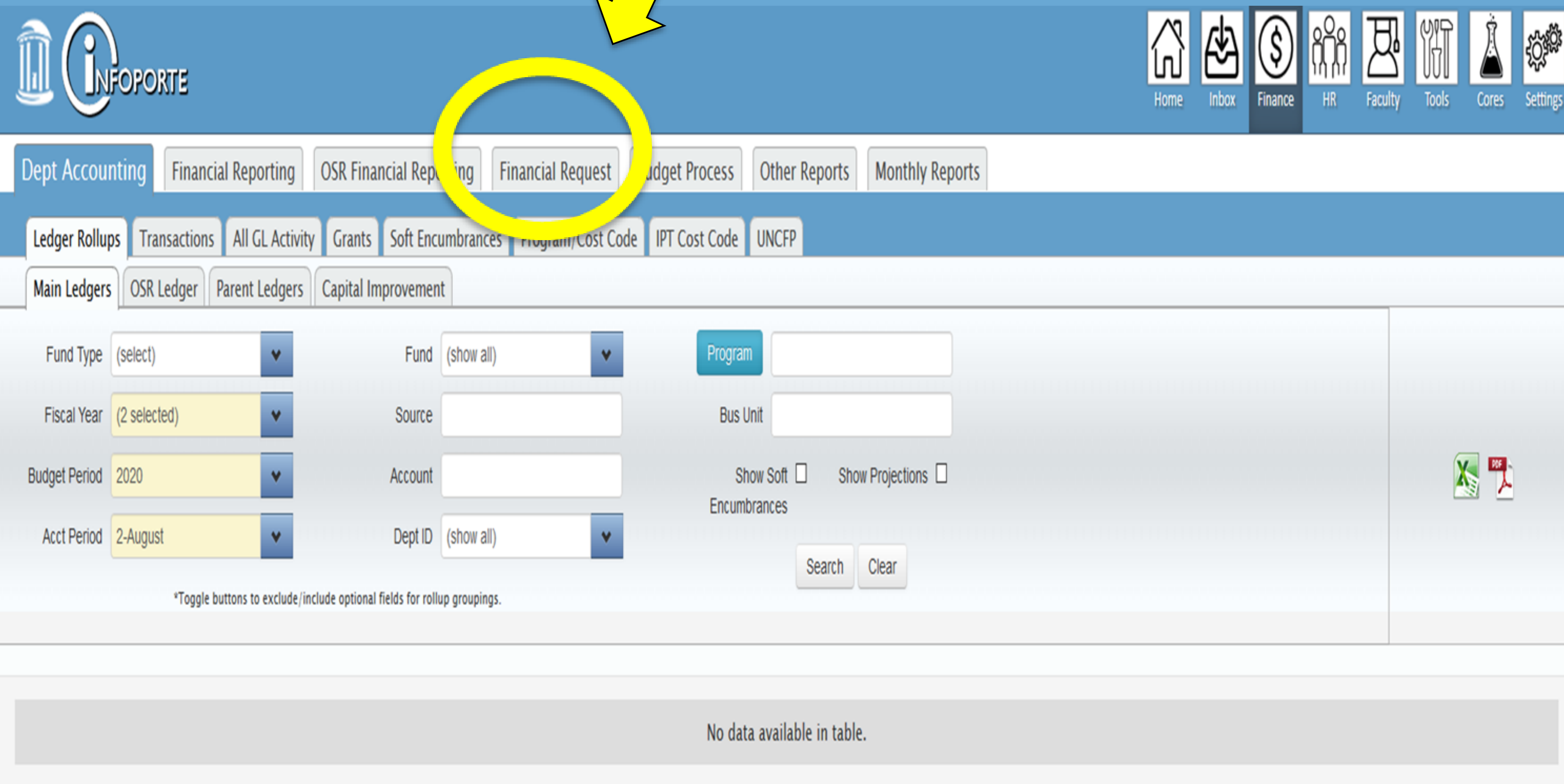
- Not putting dept. name & # when required
- Selecting both view only & user options
- Incomplete headers
- Not including Pcard or SPMS supplemental forms
- Not completing training
- Submitting request before hire/transfer date

How to submit an access request in InfoPorte

THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

How to submit an access request

Select Financial Request



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

How to submit an access request

Dept Accounting | Financial Reporting | OSR Financial Reporting | Financial Request | Budget Process | Other Reports | Monthly Reports

New Request

Request Type

Miscellaneous Accounting

Request Type

Request Route

Receive status change emails

Name or Request Title

Request Description

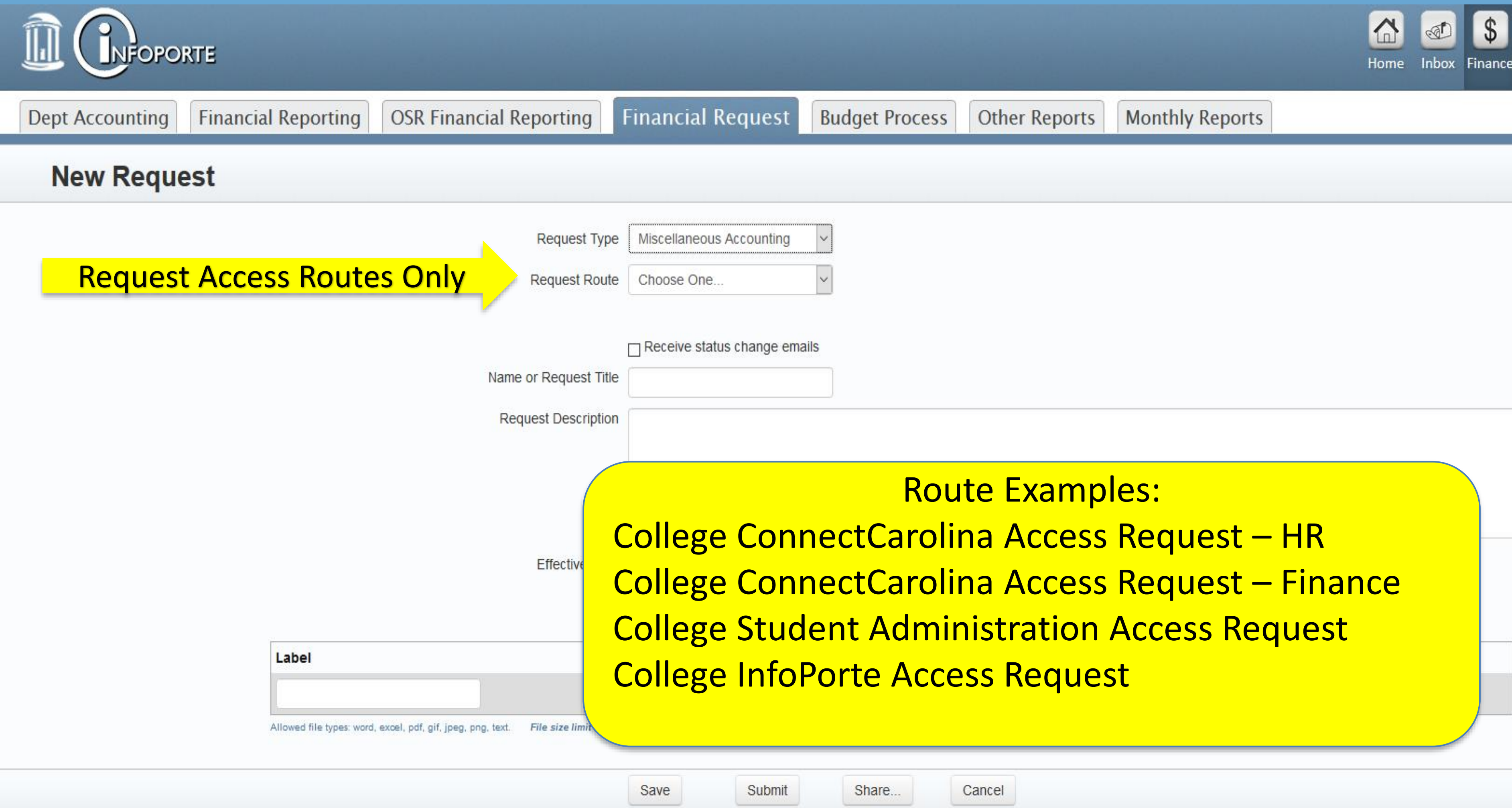
Effective Date

Fund Transfer Form

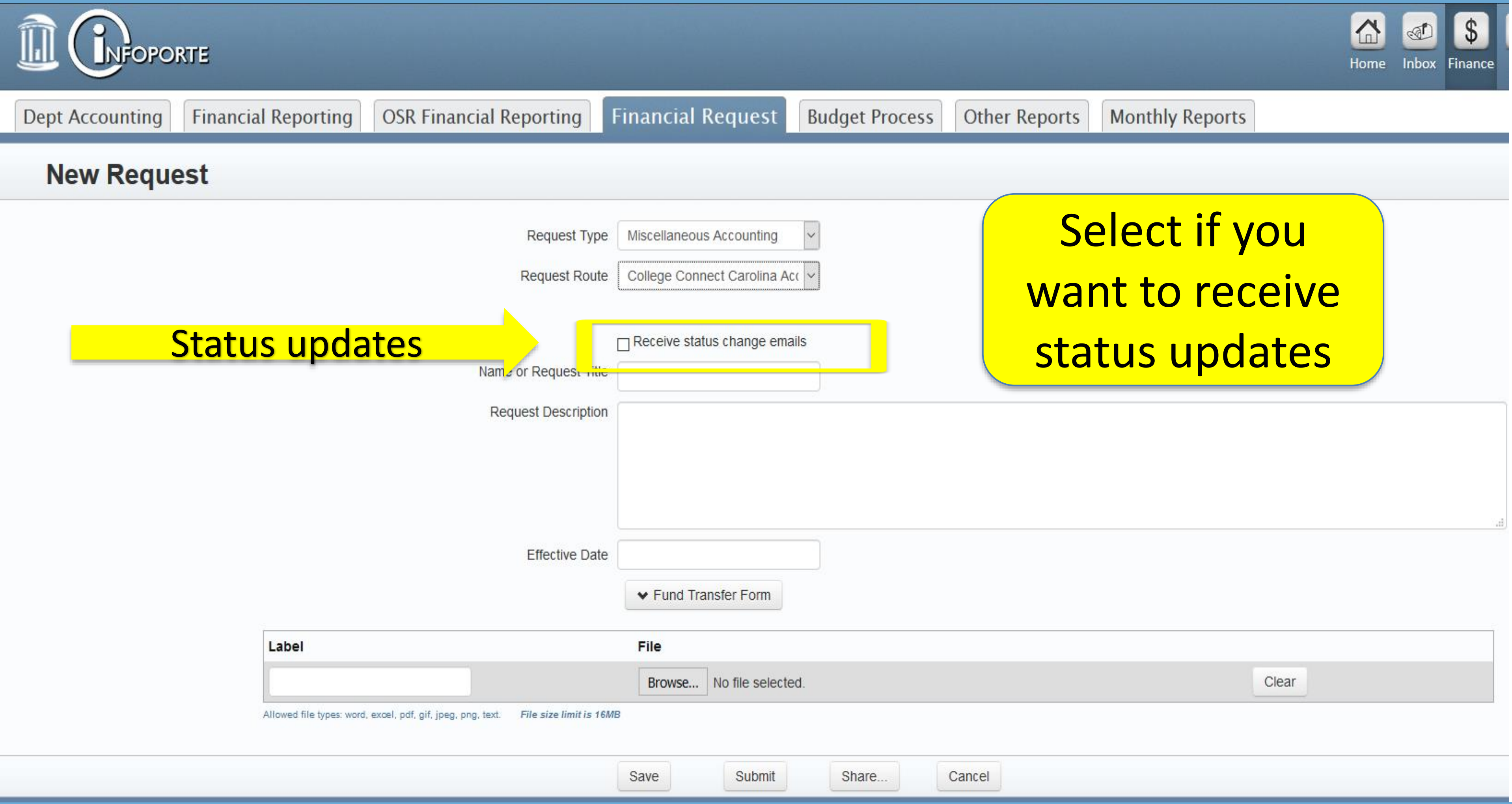
Label	File	
	Browse... No file selected.	Clear

Allowed file types: word, excel, pdf, gif, jpeg, png, text. *File size limit is 16MB*

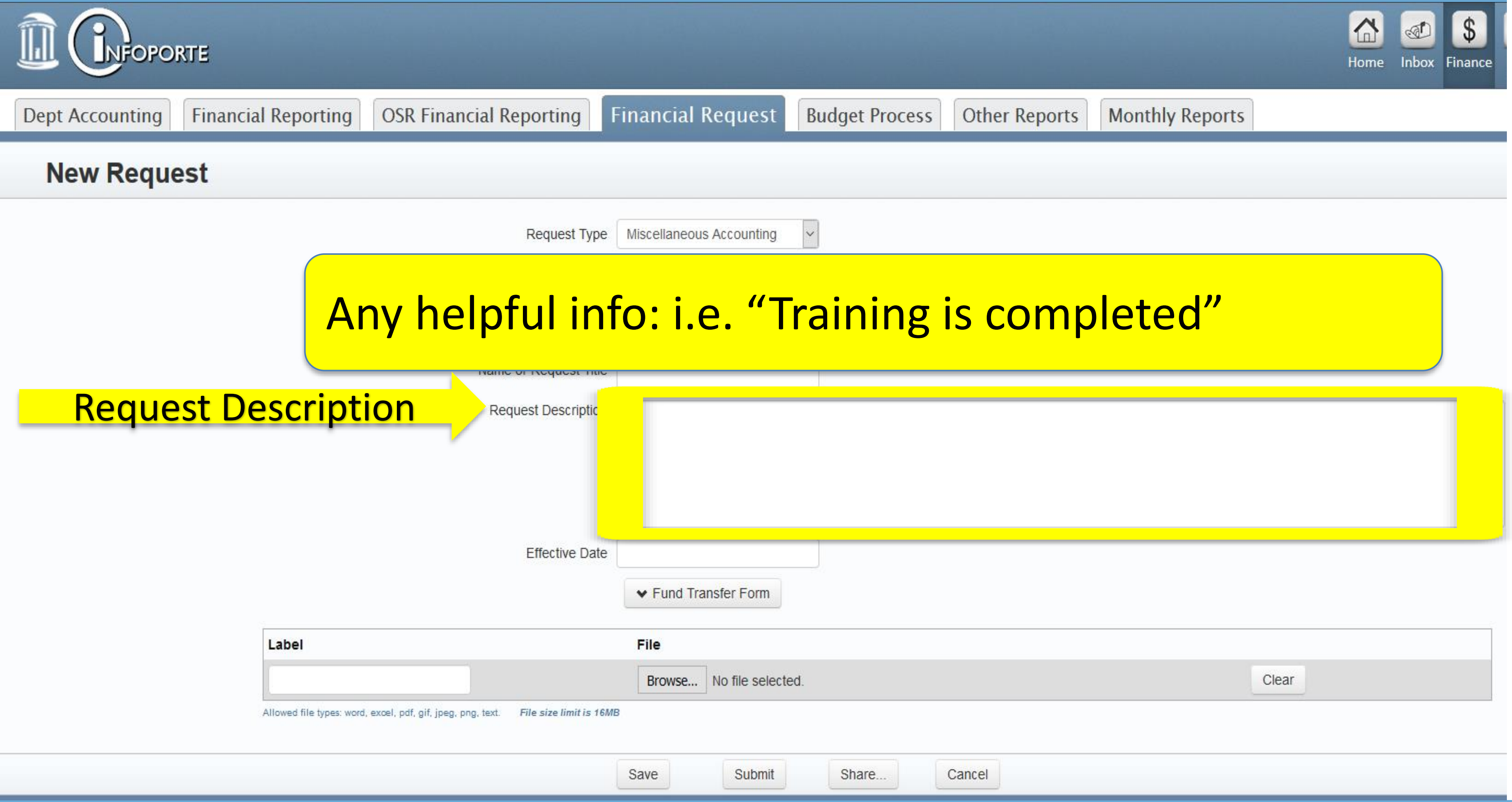
How to submit an access request



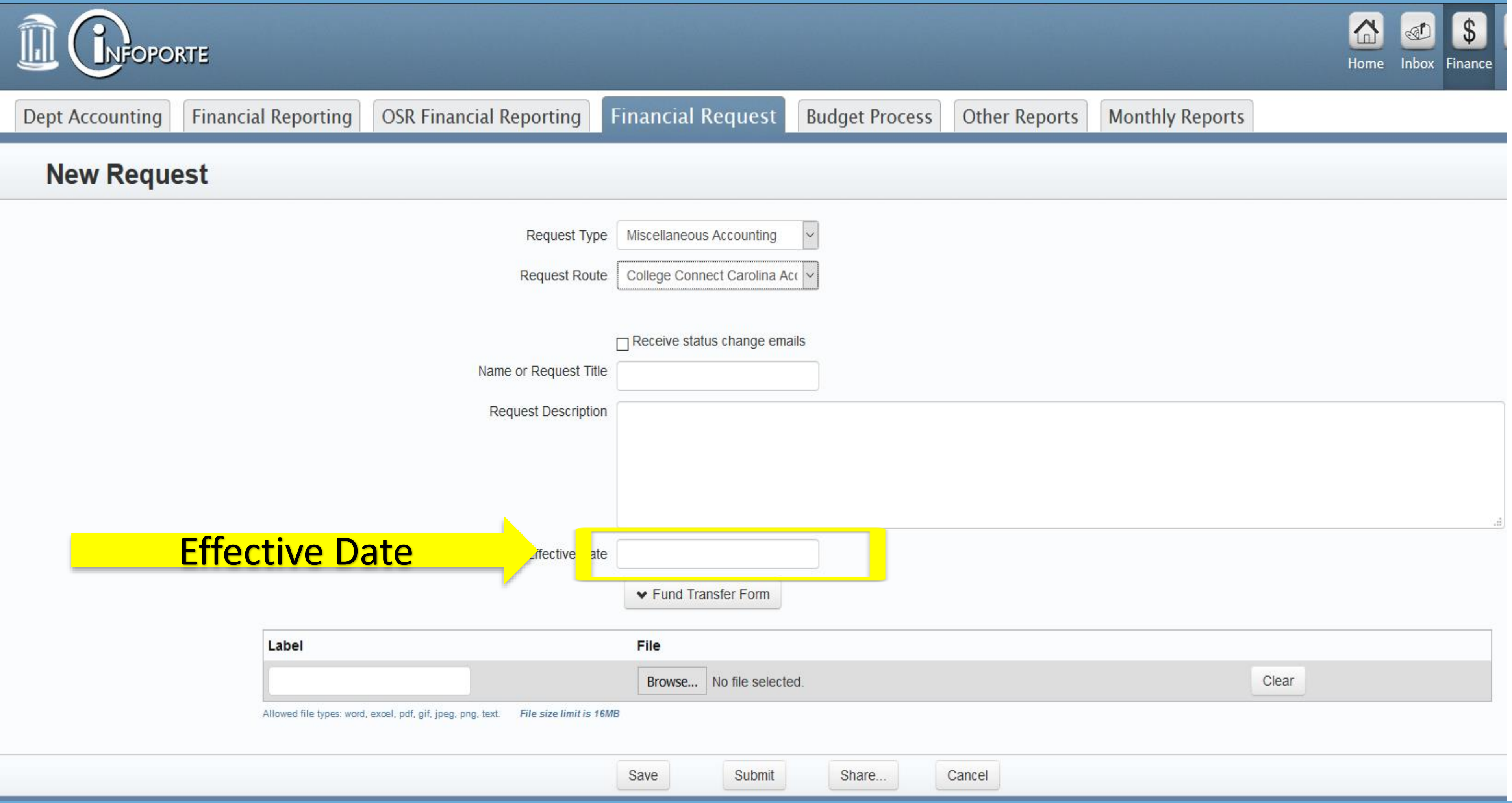
How to submit an access request



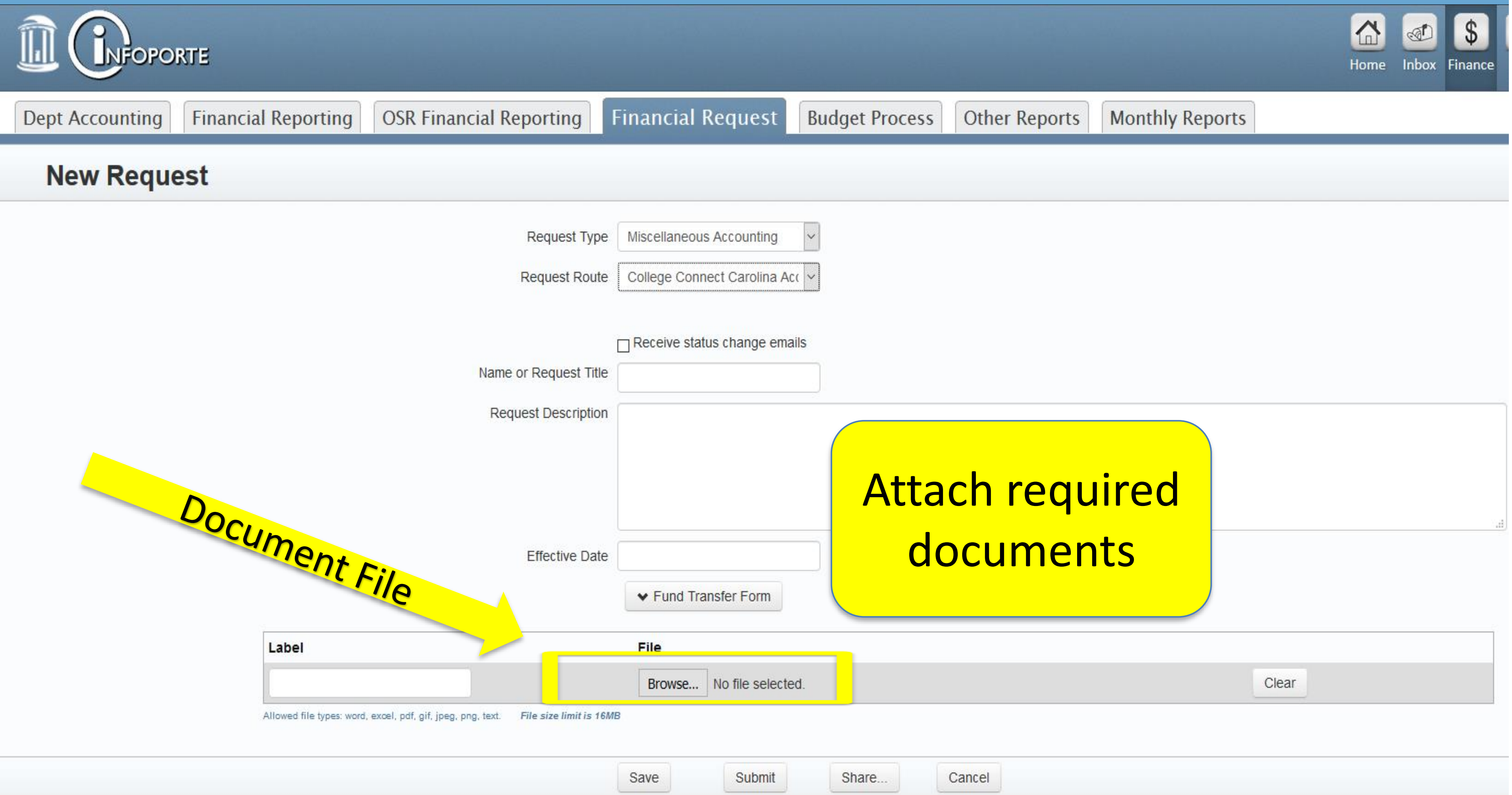
How to submit an access request



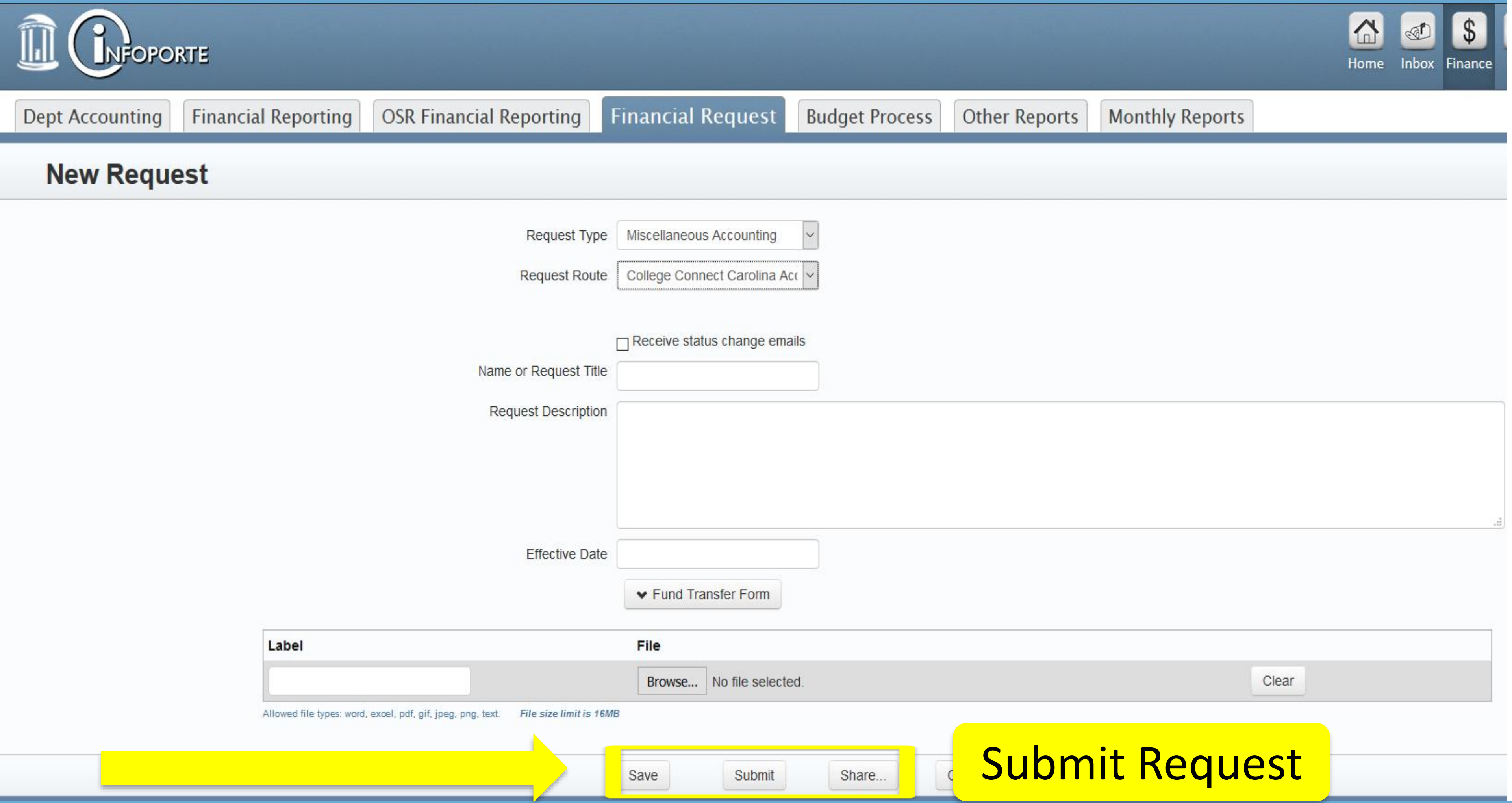
How to submit an access request



How to submit an access request



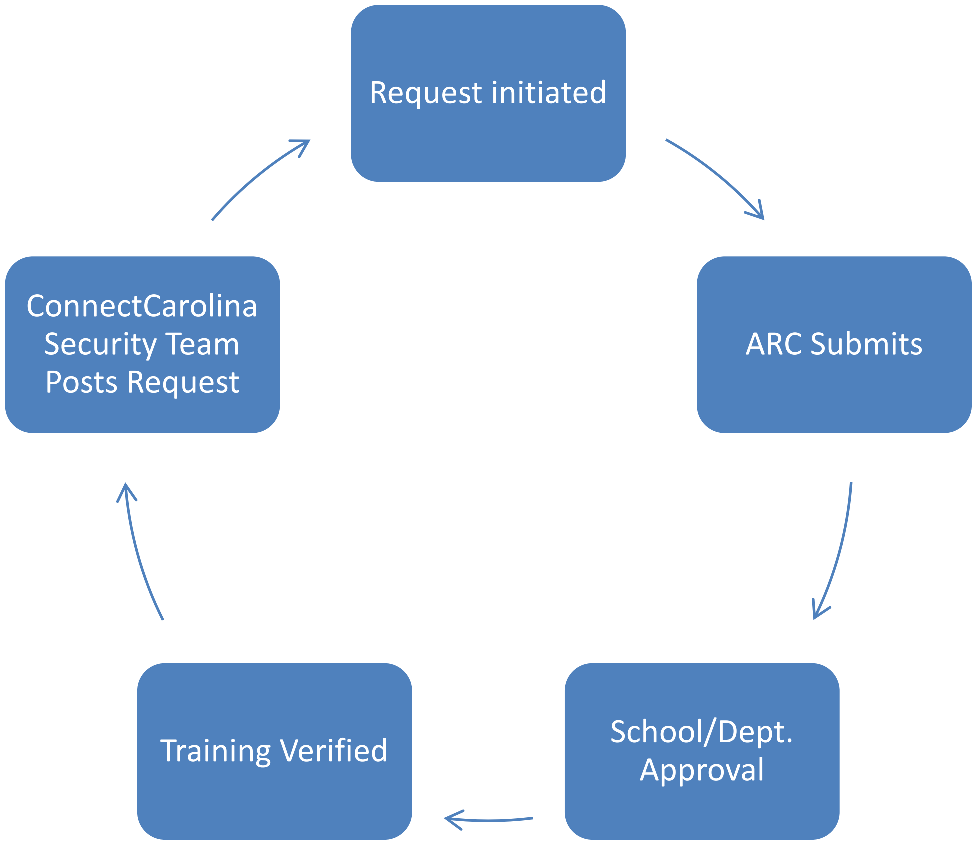
How to submit an access request



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

The Lifecycle of an Access Request

After your request is submitted, it must move through several stops. Depending on time of the year and training required, processing time can take from 2 business days to several weeks.



Examples of InfoPorte Update Comments

User	Routing Stop	Action	Date/Time	Message
Laura Yurco	0	Originated	6/4/2019 14:50	
Joy Montemorano	1	Updated	6/4/2019 16:01	Submitted for processing.
Joy Montemorano	1	Complete	6/5/2019 08:14	
Joy Montemorano	1	Posted	6/5/2019 08:14	Request Posted

<u>Updated/Submitted for processing</u> = Request has been submitted by ARC to the relevant approval routes.

<u>Complete/Posted</u> = Request completed. User should now have access.

Questions?

Call or email

[Joy Montemorano]

919-445-0201