Business Operations

ConnectCarolina & InfoPorte
Access Lunch & Learn Presentation
## Access Requests Submitted via InfoPorte

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

### HR/Payroll Systems
- ConnectCarolina HR & Payroll
- LawLogix
- CastleBranch
- PeopleAdmin

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

### 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](mailto:Joy.Montemorano@unc.edu) for others

- **Common Authorization Tool (CAT)**
  - Automatic for Managers

- **Arts & Sciences Reporting (ASR)**
  - Automatic for Managers
  - Email [Joy Montemorano](mailto:Joy.Montemorano@unc.edu) for others

- **Manager Listserv**
  - Automatic for Managers (only available to managers)

- **Workflow Config**
  - For non Accounting Srvcs Depts. only
  - Managers added automatically
  - Manager 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](mailto:RAMSeS_form@finance.unc.edu) ~ [Backbone form](mailto:Backbone_form@finance.unc.edu)

- **Listserv Management**

- **TIM Administrator**
  - Sign-up classroom training @ finance.unc.edu
  - Submit [enrollment form](mailto:enrollment_form@finance.unc.edu) to [Kristen Dunivant](mailto:Kristen.Dunivant@unc.edu) after training class

- **SAS Reports**
  - Automatic for Managers
  - Email [Joy Montemorano](mailto:Joy.Montemorano@unc.edu) for others

- **Surplus Property Management**
  - Submit a [CC Finance Request](mailto:CC_Finance_Request@finance.unc.edu) in InfoPorte
  - Include a [SPMS Registration Form](mailto:SPMS_Registration_Form@finance.unc.edu) 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
Welcome to the New Look
Getting Started

RECENT NEWS

What the Testers Are Saying About the New Look

POSTED 3 WEEKS AGO

"It is a lot! Very modern, looks like a tablet." "It’s easy to miss the little arrow to change to different homepages." "After login, the homepage look puts me at ease." I’d like to be able to favorite a ... Continued

Since You Asked... Click to Learn

POSTED 3 WEEKS AGO

What’s on my new Home page? What changes are in store for students? Is it true that the Faculty Portal is not changing? What’s this about the Log In page changing? What happened to all of the links that used ... Continued

ConnectCarolina Moves Forward – Things to Know

POSTED 3 WEEKS AGO

On May 20, ConnectCarolina will have an improved look and navigation. Students, faculty and staff worked with the project team on the new Home page design and functionality. There will be a ConnectCarolina outage

Live and Recorded Webinars for Admin Users: Learn More About the ConnectCarolina Makeover

POSTED 1 MONTH AGO

The ConnectCarolina team will be hosting webinars specific to the area you work in to give you an advance look and tell you about the changes that are coming.
From the “Get Access” tab you can find info like:

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

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

- Terms of Use: ConnectCarolina login page
- Access Request Coordinators (ARC) and InfoPorte Administrators: InfoPorte Admin
- List of Campus Unit Finance Leads (formerly called MOU leads): Campus Unit Finance
- 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

For **PI Dashboard** access you’ll need to submit list of PI names & PIDs
Who can sign this form?
Dept. Manager or Dept. Chair
CC Finance Applications

*Finance* ConnectCarolina and Related Applications Access Request Form

Updated 8/17/18

**Finance Roles**

- Web Travel
- P-Card*
- Surplus Property Management*

*Supplemental forms required

**Web Travel - Campus**

- Web Travel User** - allows someone to access Web Travel and create Travel Documents. It also grants Approvers access to the application.
- Web Travel FRED Administrator** - allows someone to set up workflow Approval Groups and Routes for departments.

**Web Travel - Central Office Only**

- Web Travel Agent** - allows a Travel Agent from one of the approved Travel Agencies access to the Travel Agent functions.
- Web Travel All Departments Reporting** - grants access to the reporting feature that allows generation of reports against all departments.
- Web Travel All GA Departments Reporting** - grants access to the reporting feature that allows generation of reports against all GA departments.
- Web Travel Travel Office** - grants access to the Travel Office Functions.
- Web Travel Application Administrator** - allows a user to configure the established Web Travel business rules.

**Purchasing Card (P-Card) - Campus**

- P-Card Account holder** - allows a P-Card Account holder to access Works to allocate expenses, upload receipts, provide business justification and sign-off for P-Card transactions of Accountholders within their group.
- 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.
- 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.
- 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**

- P-Card Internal Auditor** - grants access to the Reporting functions for all P-Card in the system.
- P-Card System Administrator** - grants user access to all P-Card functions.

**Surplus Property Management**

- [ ] Grant [ ] Revoke
- [ ] Manager
- [ ] Administrator
- [ ] User

*Financial Data Level Access Needed:

<table>
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<tr>
<th>View</th>
<th>Edit</th>
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Special Data Levels Available:

- Business units:
- Department numbers:

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.

<table>
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<tr>
<th>[ ] Dean/Department Head</th>
<th>[ ] Office Name</th>
<th>[ ] Title</th>
<th>[ ] Signature</th>
<th>[ ] Date</th>
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</table>

For Access Request Coordinator Use Only:

Entered by: [ ] Date Entered:
**Who can sign this form?**
Dept. Manager or Dept. Chair
Pcard Access

One of these forms must accompany any Pcard related access request

New Card Application

Account Maintenance Form

1252.1.2F UNC-CH Purchasing Card Account Maintenance Form

For maintenance requests including SECTION 6, send completed form to your Access Request Coordinator (ARC).

For all other maintenance requests (a, b, c, e, d, 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 submitted to obtain a new card)

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

From: T

To: T

Cc: T

Cc: T

CHANGE CREDIT LIMIT(S)

Monthly Credit Limit: $10,000

Single Transaction Limit: $10,000

From: $ T

To: $ T

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

Group Approver

Add Name:

Bus. Email:

Delete Name:

Group Proxy Reconciler

Add Name:

Bus. Email:

Delete Name:

Scoped Auditor

Add Name:

Bus. Email:

Delete Name:

CHANGE CAMPUS MAILING ADDRESS

From:

To:

OTHER (please specify):

Accountholder Signature:

Bus. Mgr./Dept. Head Signature:

THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

Pcard Access

One of these forms must accompany any Pcard related access request

New Card Application

Account Maintenance Form

1252.1.2F UNC-CH Purchasing Card Account Maintenance Form

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

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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: T

To: T

Cc: T

Cc: T

CHANGE CREDIT LIMIT(S)

Monthly Credit Limit: $10,000

Single Transaction Limit: $10,000

From: $ T

To: $ T

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

Group Approver

Add Name:

Bus. Email:

Delete Name:

Group Proxy Reconciler

Add Name:

Bus. Email:

Delete Name:

Scoped Auditor

Add Name:

Bus. Email:

Delete Name:

CHANGE CAMPUS MAILING ADDRESS

From:

To:

OTHER (please specify):

Accountholder Signature:

Bus. Mgr./Dept. Head Signature:

THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
Pcard Account Maintenance Updates

- 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

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 AR Cs can be found at C C Info at: https://ccinfo.unc.edu/files/2017/03/Infoporte-Admin_Access-Request-Coordinator-list.pdf

604.1.1f - Surplus Property Management System (SPMS) Department Initial Registration Revised 02/21/2019
### HR Systems Access

#### ConnectCarolina HR
- LawLogix
- CastleBranch
- PeopleAdmin

*Roles allowed vary by department*

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**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**

**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**

- Visit student financial information – Student Services Managers (External View Only)
- View department charges to student accounts (Post Dept Charges) – Requires Student Financials training and a Service Level Agreement
- View department charges to student accounts in batch (Post Dept Charges – Batch) – Requires Student Financials training and a Service Level Agreement
- View credits of charges billed through Cashier’s Office (Dept Charges Query)

**STUDENT RECORDS**

- Have you had ConnectCarolina access before? (Yes/No) – Yes is in the department
- View students’ programs, plan, sub-plan, enrollments, and transcript
- Modify students’ programs, plan, sub-plan; enroll drop-above single courses for students during open enrollment; enroll/drop students from a single course during the drop window; enroll/drop students from a single course after the registration period closed; work with overrides to process enrollments, view wait lists; cancel existing enrollments or add new students for one or more terms; and term activate students.
- Create student blocks and course blocks; merge student blocks with course blocks; handle overrides for students in block-ensrolled classes; retrieve the results of the block enrollment process, and search for previously-processed block enrollments.
- Access Tar Heel Tracker reports, submit adjustments to students’ (Tar Heel Tracker) – Requires Student Records training class
- 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.
- View scheduled classes (Scheduling – View Only)
- 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.
- Requires Student Records training

**OTHER**

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

**Department name and number (required):**

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

Click on the Finance tab in InfoPorte
How to submit an access request

Select Financial Request
How to submit an access request

New Request

Request Type

Miscellaneous

Accounting
How to submit an access request

Request Access Routes Only

Route Examples:
- College ConnectCarolina Access Request – HR
- College ConnectCarolina Access Request – Finance
- College Student Administration Access Request
- College InfoPorte Access Request
How to submit an access request

Select if you want to receive status updates
How to submit an access request

Any helpful info: i.e. “Training is completed”

Request Description
How to submit an access request
How to submit an access request

Attach required documents
How to submit an access request

Submit Request
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.

1. **Request initiated**
2. **ARC Submits**
3. **School/Dept. Approval**
4. **Training Verified**
5. **ConnectCarolina Security Team Posts Request**
Examples of InfoPorte Update Comments

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

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

<table>
<thead>
<tr>
<th>User</th>
<th>Routing Stop</th>
<th>Action</th>
<th>Date/Time</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laura Yurco</td>
<td>0</td>
<td>Originated</td>
<td>6/4/2019 14:50</td>
<td></td>
</tr>
<tr>
<td>Joy Montemorano</td>
<td>1</td>
<td>Complete</td>
<td>6/5/2019 08:14</td>
<td></td>
</tr>
<tr>
<td>Joy Montemorano</td>
<td>1</td>
<td>Posted</td>
<td>6/5/2019 08:14</td>
<td>Request Posted</td>
</tr>
</tbody>
</table>
Questions?

Call or email

Joy Montemorano

919-445-0201