Finance and HR/Payroll Project Update for CTC

Fran Dykstra
Assistant Vice Chancellor
Enterprise Applications, ITS

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Connect CAROLINA

The Basics

- HR/Payroll and Finance join Campus Solutions in ConnectCarolina
- Major changes:
  - Chart of Accounts is changing from simple FRS structure to more complex PeopleSoft chartfields
  - Department numbers are changing from 4 digits to 6 digits; number of departments greatly expanded
  - New business processes
  - New systems with new interfaces, new concepts for entering and retrieving data
  - New reporting tools
  - New sources of person, department and account information
  - No one will be an expert on Day 1 (not in central offices and not on campus)

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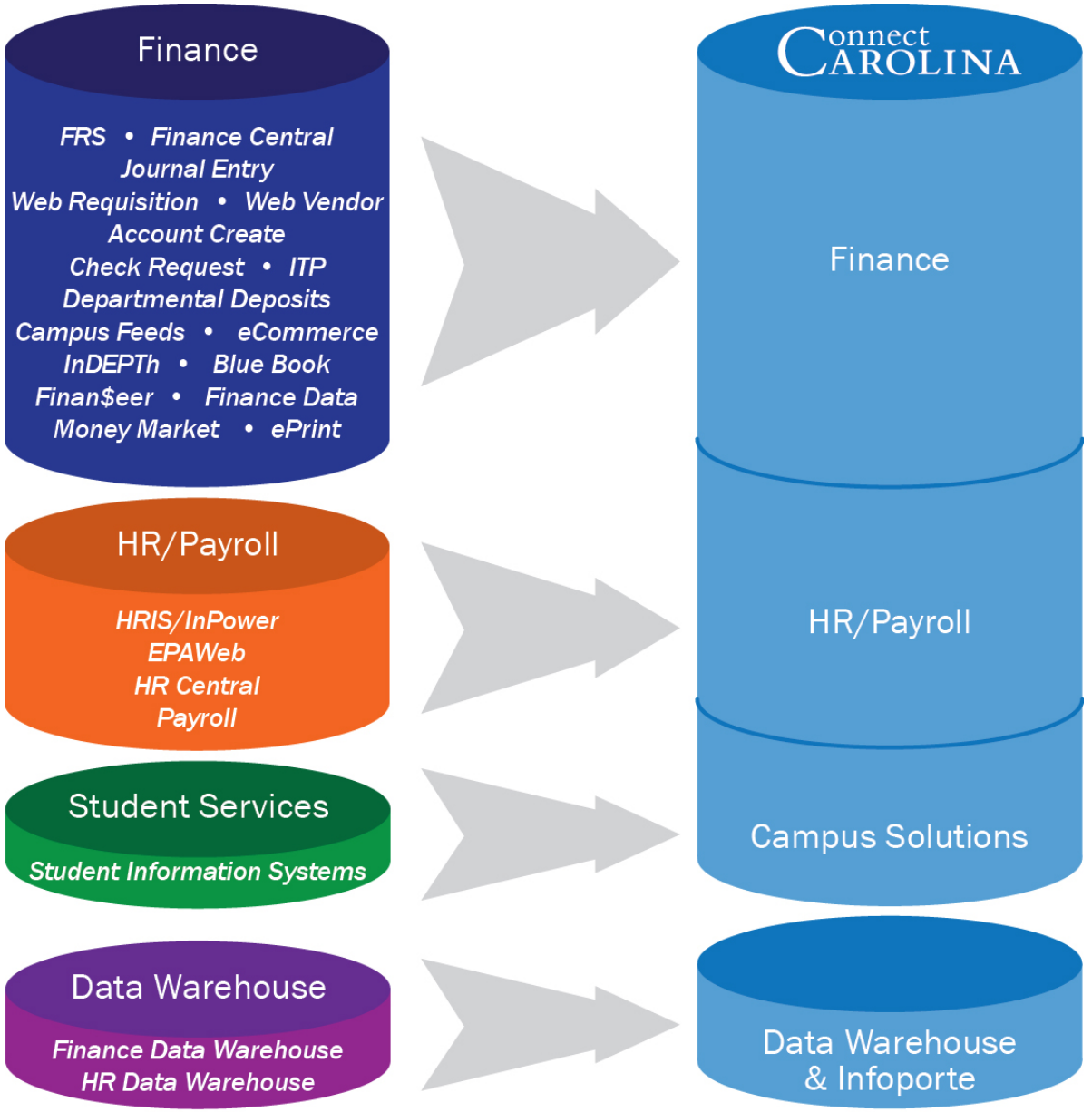
Systems Going

Legacy Systems



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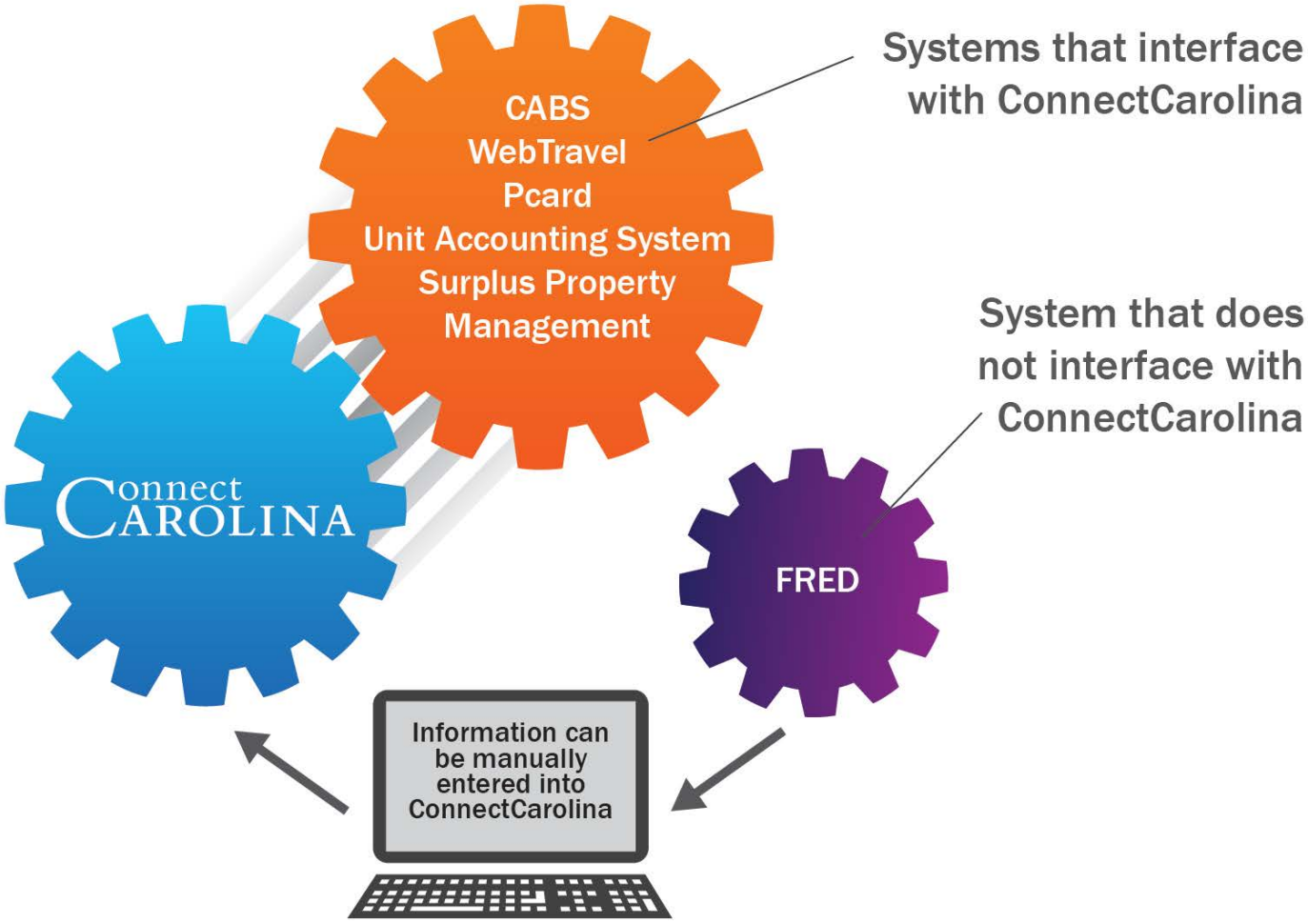
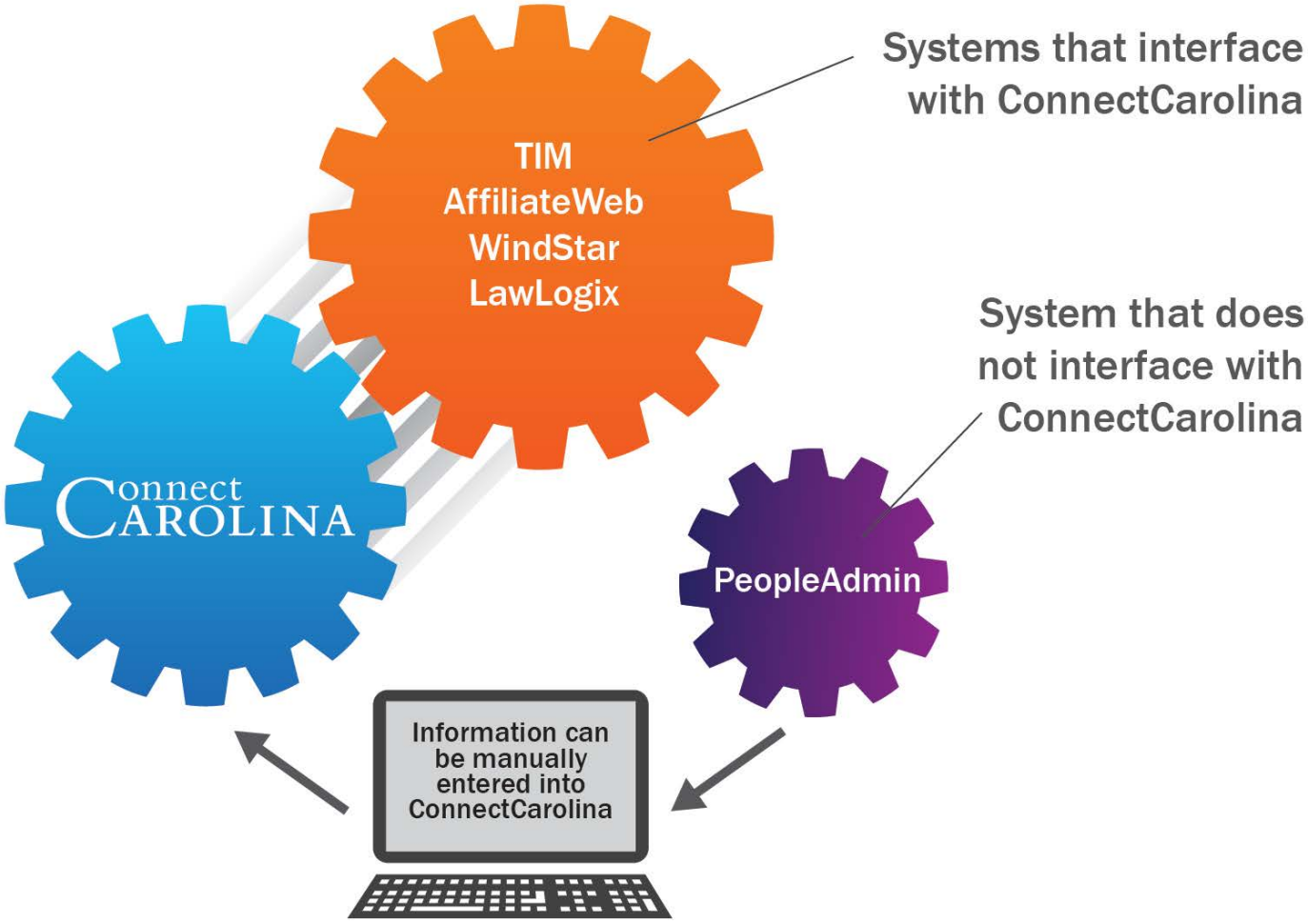
Impacts on Campus Users

- Paychecks and accessing paycheck stubs
- Purchasing goods and services
- Hiring consultants or staff
- Purchasing software
- Submitting vouchers for payment
- Charging for services
- Signing up for HR's training courses
- Obtaining person, department and account code information
- Monitoring expenditures
- Reporting on budgets and costs
- Managing grants, departments, schools, and divisions

Finance Systems Not Replaced by ConnectCarolina



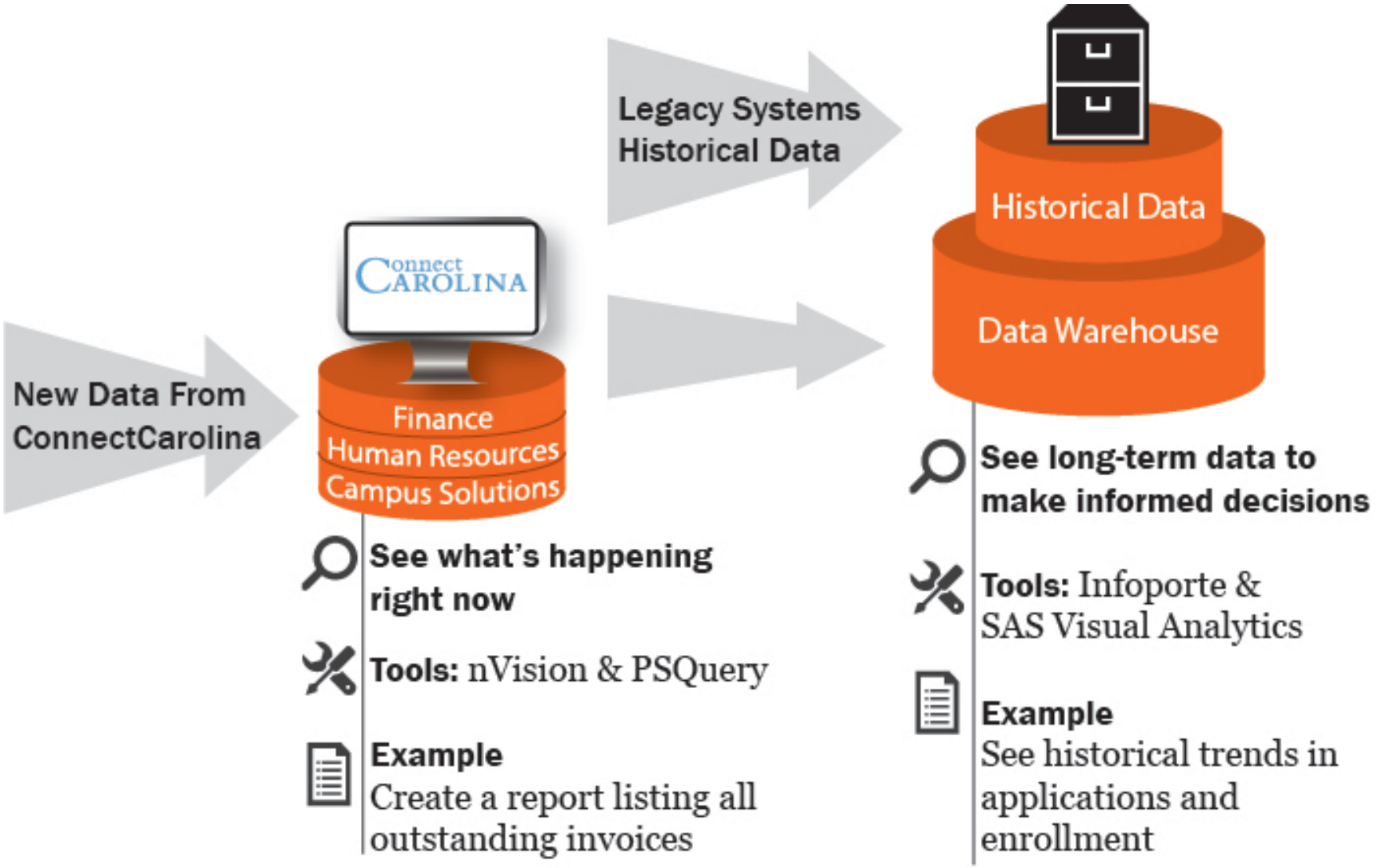
HR/Payroll Systems Not Replaced by ConnectCarolina



Business Intelligence (Reporting)

- People Soft reports
  - Tools: nVision, PSQuery
- InfoPorte
- SAS Visual Analytics tools
- Legacy data and historical reporting
- Website: http://its.unc.edu/erds (Enterprise Reporting and Departmental Systems)
  - Scott Jackson, Executive Director

Reporting Data Flow



Some Technical Information

- Retrofitting systems
  - New chartfields
    - Chartfields 101: https://ccinfo.unc.edu/files/2014/04/Chartfields-101-0422.pdf
    - Chartfields webinar: https://ccinfo.unc.edu/files/2012/03/Chartfields-Webinar-March-24-2014.pdf
  - 6-digit department number replaces old 4-digit department number
- Portal provides single site for access to CC Applications
- ImageNow provides image upload and retrieval capabilities via PeopleSoft for some transactions
- Interfaces with other systems
- Departmental Data Access (DDA) data flow
- Printing from ConnectCarolina
- Security – Single Sign-on Authentication
- Firewall Settings: VPN for off-campus access and UNC-Secure for on-campus wireless access

Recommended Browsers

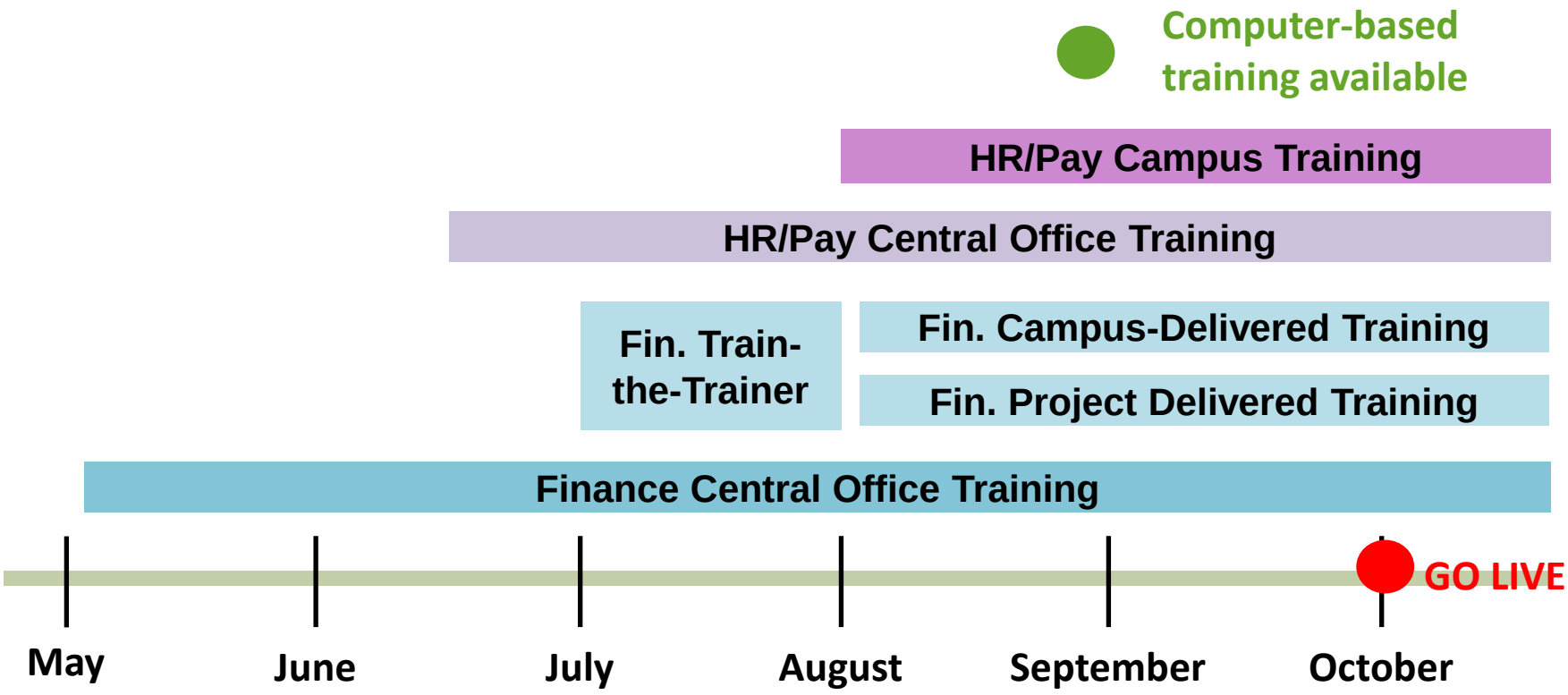
Internet Explorer 9 or greater	Firefox 26 or greater	Safari 5 or 6 (Safari 7 and earlier versions are not supported)	Chrome 28 or greater

- Compatibility View in Internet Explorer (IE)
  - ConnectCarolina will work best if the Compatibility View is turned on in IE
- ConnectCarolina performs fastest with IE 10
- Next best is Mozilla Firefox
- Recommended browsers document on ccinfo.unc.edu website and on portal landing page (connectcarolina.unc.edu)

Training

- Training is REQUIRED to get access to the system
- Over 4,500 people require training
- Types of training
  - Instructor-led by professional trainers
  - Train-the-Trainer model (finance only)
  - Instructor-led by School or Division peers
  - Computer-Based Training

High-Level Training Schedule



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Readiness Assessment

- Help schools and units prepare for cutover
- Includes checklist for End User PC Readiness
- Was sent to the MOU leads and HR Officers about a week and a half ago
- Can be shared with you; check with your MOU lead or HR Officer about taking a look

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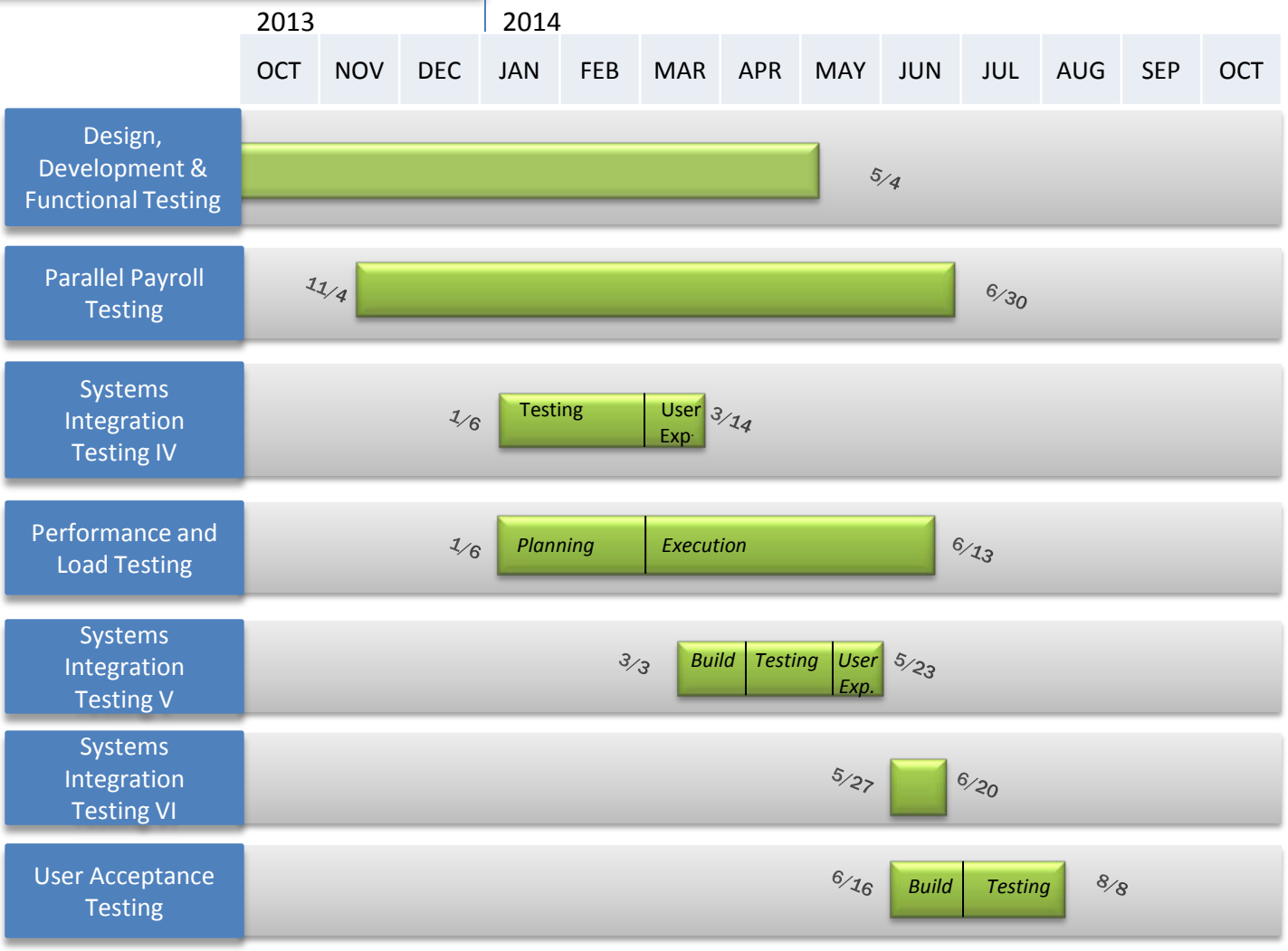
Project Status

Project Timeline



Cutover

- Details of cutover to be released very, very soon
- Includes:
  - Dates when transactions will cease in legacy systems
  - Timeline for conversions into PeopleSoft
    - How to handle “in-flight” items from legacy systems
  - Date when transactions will begin in PeopleSoft

Post Go-Live User Support

- New Help Desk Organization Established
  - Reports to Priscilla Alden, AVC User Support & Engagement, ITS
  - A separate unit from ITS Help Desk to provide Finance and HR support
  - Will use ITS Help Desk technology
- Staffing
  - Recruiting for Director of Business Systems Help Desk
  - HR Support Lead plus 3 FTEs (transferring positions from OHR)
  - Finance Support Lead plus 4 FTEs (new positions to be staffed)

Town Hall – June 18

- Wed., June 18, 2pm to 3:30pm, Genome Sciences Building, Room G100
- Please urge your colleagues to attend
  - PDF of flyer on http://ccinfo.unc.edu
- Topics include:
  - Cutover process
  - Training
  - Reporting
  - End user experience
- Webcast live! http://ccinfo.unc.edu

Questions?

THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL
ConnectCarolina User Information
Home
About
FAQ
News
Finance
HR & Payroll
Campus Solutions
System Help
Training
Go-Live
Home
Search this site
Go
Cutover Planning
Early October Transition to ConnectCarolina
The transition to ConnectCarolina will not be as simple as flipping a switch. A large number of individual tasks will have to be executed over several weeks to transition from legacy systems to Connect Carolina. Read more...
SPOTLIGHT
Submit Feedback
Submit your questions, ideas, concerns or feedback about ConnectCarolina.
Campus Reps
Find out who are the campus representatives working on the project.
RECENT NEWS
Early October Transition to ConnectCarolina
March 26, 2014
Chartfields and Town Hall Webinar Recordings Available
March 25, 2014
Integrated System for a Growing University