

# CISD Onboarding Schedule

## Monday, October 9

- 8:00 am — 1:00 pm: UNC Orientation
  - [Directions, agenda and what to bring](#)
- 1:30 pm: Report to Justin Case at 400 Roberson Street
  - Tour of building and introductions
  - Get supplies
  - Submit parking permit request
  - Settle in to desk
- 2:30 pm — 4:00 pm: CISD team meeting

## Tuesday, October 10

- 8:00 am: Computer orientation with James Glenos
  - Login
  - Orientation to email and Office 365
    - Request parking permits for Wed am via Outlook
    - Set up to view calendars for all of Justin's team
  - Install Adobe Creative Cloud products—Acrobat Pro and Photoshop. Enterprise IDs are:
    - [jdoe@unc.edu](mailto:jdoe@unc.edu)
    - [jdeer@unc.edu](mailto:jdeer@unc.edu)
- 1:00 pm: Meet with Cortney Alston
  - Introduction to TIM—see finance site for training materials
  - ConnectCarolina review
    - Enter info into Self Service as needed
    - See paystubs
  - Login to InfoPorte (make sure they accept the Terms of Use Agreement before logging in)
- 3:00 pm: Meet with Joanne Filley
  - Go over UNC and F&A Org Charts
  - Intro to F&A websites and shared drives
  - Subscribe to Listservs

## Wednesday, October 11

- 9:00 am — 10:00 am: Observe Fire Extinguisher training with Michele Bowen
  - Giles Horney Building, Parking Lot
  - 103 Airport Drive
- 10:00: Facilities tour with Michele

*Tips from*

<http://new.unc.edu/milestones/>

## Your First Week

- [Review Employee Policies](#)
- Complete Orientation Feedback Survey
- Learn your [PID & Onyen](#)
- Pick up your [OneCard](#)
- Set up [your parking](#), learn [your bus route](#), or review [CAP options](#)
- Prepare questions for your supervisor (attire, hours, timekeeping, expectations, etc.)
- Download or bookmark a [campus map](#)
- Complete required training such as [Title IX Awareness](#) and/or [EHS training](#)
- Attain appropriate systems access

## Your First Month

- Complete [UNC directory](#) information
- Enroll in [benefits](#)
- Request ongoing feedback from your supervisor
- Discuss performance and professional development goals
- Learn about [Organization & Professional Development](#) and other training opportunities
- Get to know your [pay periods and payroll calendar](#)

## Your First Year

- Continue to seek regular informal feedback from your supervisor
- Take a campus tour, either [in-person](#) or [virtually](#)
- Learn more about [Tar Heel perks and discounts](#)
- Complete the annual [performance evaluation process](#) and performance planning process
- Talk with your manager about your Carolina experience to date:
  - Is the role what you expected?
  - What's working well, what could work better?

## Thursday, October 12

- ☐ 9:00: Kyle has one-on-one with Justin
- ☐ 10:00: Alex has one-on-one with Justin
- ☐ 1:00: Meet with Joanne
  - Review CISD employee guide and on-boarding check lists
  - Identify gaps in orientation that need to be addressed
  - Kyle and Alex to describe their experience with file storage, Office 365, content management etc. to see if they have areas of insight that could help our processes
  - Discuss TBD projects they can get started on
- ☐ 3:00: Meet with Amanda
  - Intro to shared file storage
  - Intro to contact and task lists

## Monday, October 16

- ☐ 11:30 – 1:00: Team lunch

## Tuesday and Wednesday October 17 and 18

- ☐ 8:00 am – 3:00 pm: Observe Transportation & Parking In-service

## Monday, October 30

- ☐ 1:00 pm – 5:00 pm: Observe [Creating Journal Entries](#)
  - This course, which is taught by campus trainers, provides an overview of the campus journal process, demonstrates how to create journal entries and correcting journal entries according to the transaction type, explains how to identify and resolve journal edit and budget checking errors, and how to monitor journal status.
  - Administrative Office Building (AOB), 104 Airport Drive, Room 3101

## Tuesday, October 31

- ☐ 10:00 am – 12:00 pm: Observe [Making University Deposits](#)
  - This course covers the high-level concepts and ConnectCarolina tasks necessary to process incoming payments at the department or school level.
  - Administrative Office Building (AOB), 104 Airport Drive, Room 3101
- ☐ 1:00 pm – 4:30 pm: Observe [Creating Purchase Requisitions and Receiving](#)
  - This course explains how to create a requisition for goods or services that require a purchase order. Topics include entering commodity codes, charging one or more lines to different chartfields, submitting a requisition for approval, using the Manage Requisition page to work with existing requisitions, the approval process, and receiving.
  - Administrative Office Building (AOB), 104 Airport Drive, Room 3101

## November

### Wednesday, November 1

- ☐ 9:00 am – 12:00 pm: Observe [Requesting Vendors and Independent Contractors](#)
  - This course covers the processes and tasks necessary to request a new vendor, or to request changes to existing vendors.
  - Administrative Office Building (AOB), 104 Airport Drive, Room 3101
- ☐ 1:00 pm – 4:00 pm: [Creating Campus Vouchers](#)
  - This course explains how to create, maintain and monitor campus vouchers which are used to pay invoices.
  - Administrative Office Building (AOB), 104 Airport Drive, Room 3101

Thursday, November 2

- 1:00 am – 5:00 pm: Observe [Managing Budgets and Creating Budget Journals](#)
  - This course gives an introduction to how budgeting works in ConnectCarolina and shows how to create budget journals and budget transfers. It also explains how to budget pre-check transactions (such as purchase requests), and how to resolve budget errors.
  - Administrative Office Building (AOB), 104 Airport Drive, Room 3101