

ConnectCarolina Navigation Tips

A. Logging in to the ConnectCarolina Portal

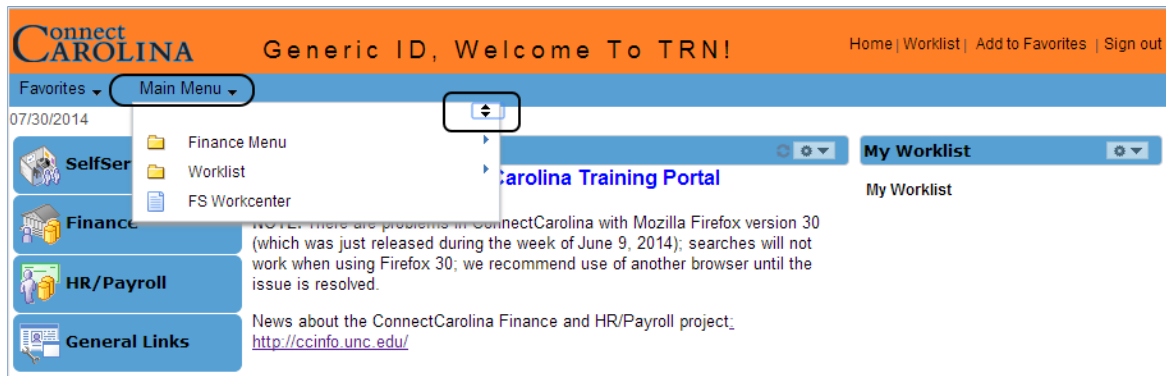
1. Access the ConnectCarolina portal through your browser: <https://connectcarolina.unc.edu/>



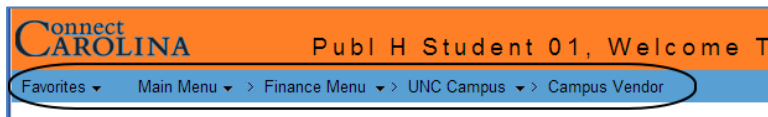
2. Click into the ConnectCarolina staff area.
3. Log into single sign-on with your onyen and password.

B. Navigation Tips

1. **To alphabetize menus** – the default menu sequence is non-alphabetized. To sort alphabetically, click on “Main Menu” to bring up the dialog box which will have to “up and down” arrows at the top right. Click until the arrow points downwards (or upwards for reverse sorting). This button is finicky so you might have to click multiple times:

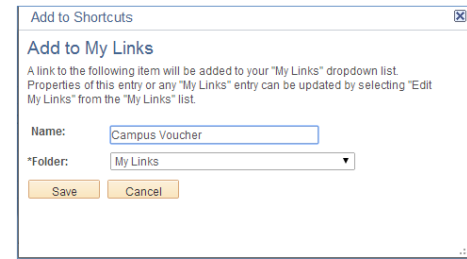
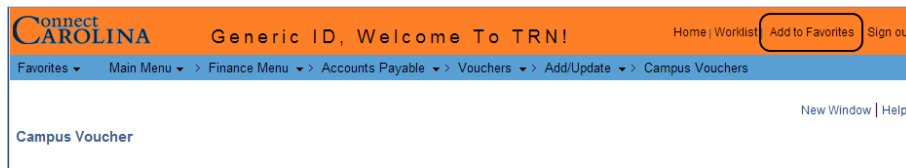


2. **Breadcrumbs** – In order to access tasks in ConnectCarolina, you will need to click through multiple menus and submenus. The blue bar at the top retains your path (“breadcrumbs”). Each submenu along the breadcrumb route may also be clicked in case you would like to retrace an earlier menu item.

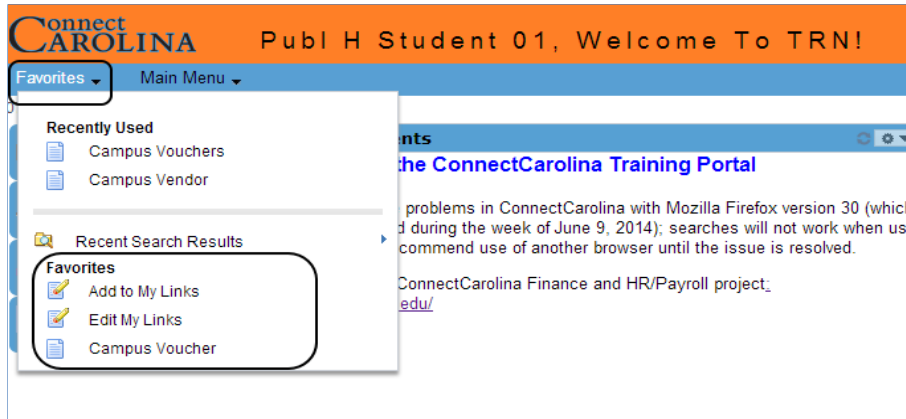


3. **Favorites** – It is possible to save pages as favorites in order to quickly access often-used tasks. At the top of the screen is an ‘add to Favorites’ button which may be accessed no matter which page you are on. Click on this to bring up a dialog box. Enter an appropriate Name of the favorite if it is not automatically populated.

In the example below, the Favorite will bookmark the Add a Campus Voucher page.

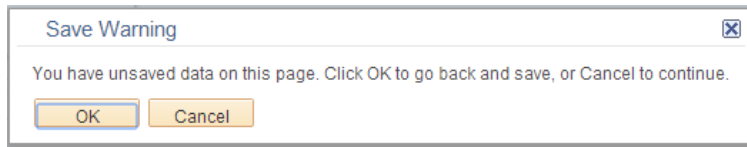


The saved favorites will appear in your favorites menu, at the left of the top menu bar.



Notes: The local browser “bookmarks” function will not work for pages within ConnectCarolina. Your favorites saved in the Training Environment will not automatically carry forward into your Production account.

4. **Cancelling Out of a Page** – If you begin to enter data on a page but click elsewhere to open another menu item before saving, the system will warn you that unsaved data on the page will be lost. The warning message is below. Note the unintuitive wording: in order to save your data, click “OK to go back and save”. Otherwise, clicking “Cancel” will *leave the page* – you will lose your data.



5. **New Window** – It is possible to simultaneously open multiple ConnectCarolina windows (or browser tabs). On most pages, there is a New Window link. Click on it to open a new tab. The new tab will replicate the page on which you clicked. For example, if you were working in Campus Voucher, the new page would also jump to Campus Voucher. You can then navigate to another menu item as you need.

