Saving Report Parameters

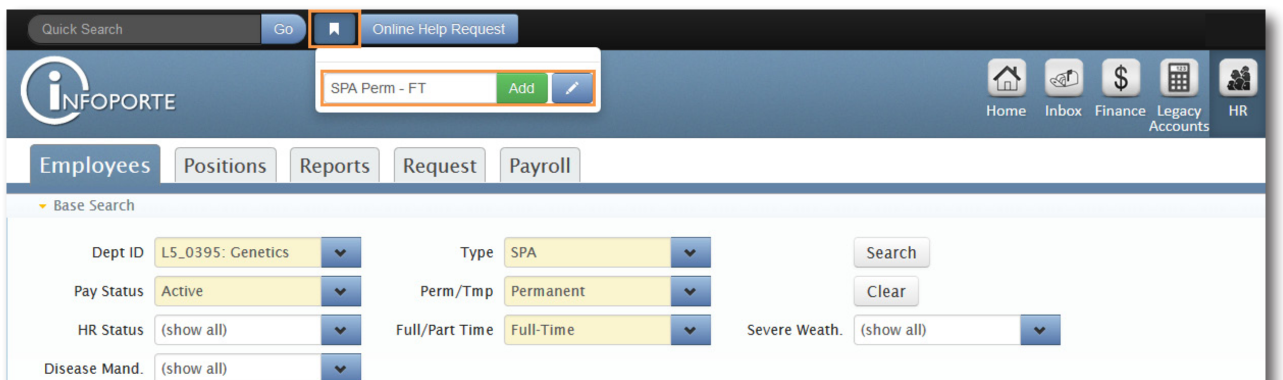
If you have certain reports that you need to run over and over, you can save time by saving the repoprt's parameters. To save report parameters, follow these steps:

1. Once you have entered your criteria, click on the **Favorites** button to the right of the Go button.

Result: InfoPorte displays the parameter window.

2. Enter a name for your parameters.
3. Click on the **Add** button.

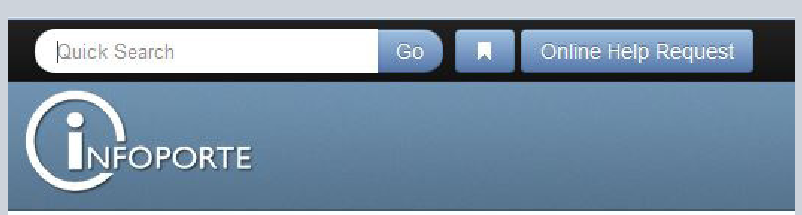
Note: Once you add your parameters, you can click on the Favorites button to display a list of saved parameters.



Note: To delete the parameters you created, click on the **Edit** button to the right of the Add button.

Helpful Tip

"Quick Search" is your friend! Use it to look up Legacy FRS accounts, people, or InfoPorte requests.



Connect Carolina

Reporting in InfoPorte

What is InfoPorte?

You can think of InfoPorte as a hub for displaying, analyzing, and working with ConnectCarolina information. Each night, updated human resources, payroll, financial, and student information is copied from ConnectCarolina to InfoPorte. Information is also copied from other key systems the University uses, including RAMSeS (for contracts and grants information), ecrt (for effort reporting), and SPOTS (for information about locations across the University). The University's legacy information is also available through InfoPorte.

Although the focus of this guide is reporting, InfoPorte also provides tools for working with the information stored there. For example, InfoPorte provides a way to add additional cost codes beyond the three cost code fields in ConnectCarolina, and it has a tool for reconciling financial statements.

Not every school and division uses all parts of InfoPorte. Check with your InfoPorte Administrator to learn which parts are used in your unit.

How Do I Access InfoPorte?

Access InfoPorte from the ConnectCarolina home page or "portal" at http://connectcarolina.unc.edu. The link to InfoPorte is on the left side of the page.

Helpful Tip

The recommended web browser for InfoPorte is Mozilla Firefox. Check that you have the latest version by choosing **Help** > **About Firefox**.

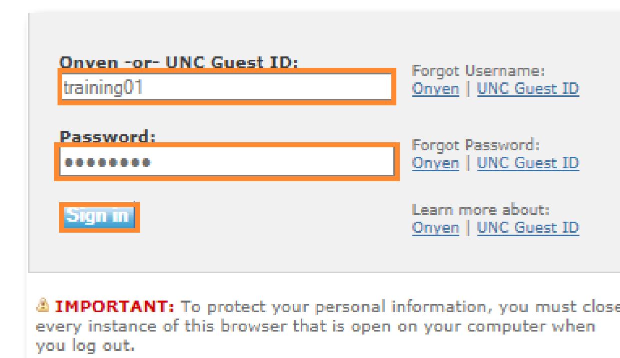
Logging in to InfoPorte

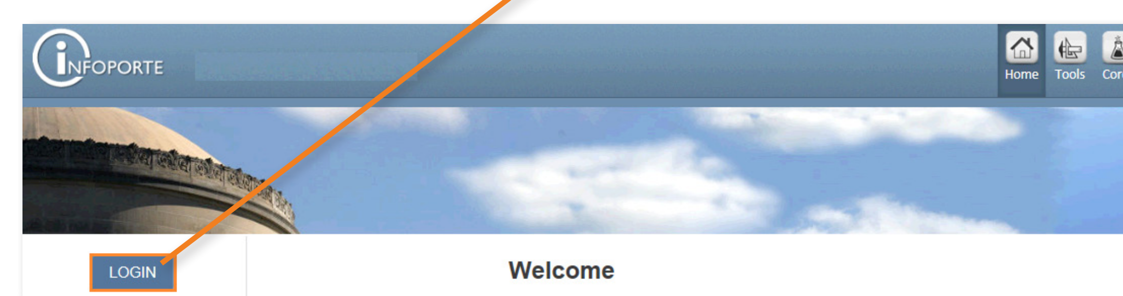
Follow these steps to log in to InfoPorte:

1. On the ConnectCarolina home page, click on the InfoPorte link.
2. On the InfoPorte home page, click on the **LOGIN** button.

Result: InfoPorte displays the sign-in window.

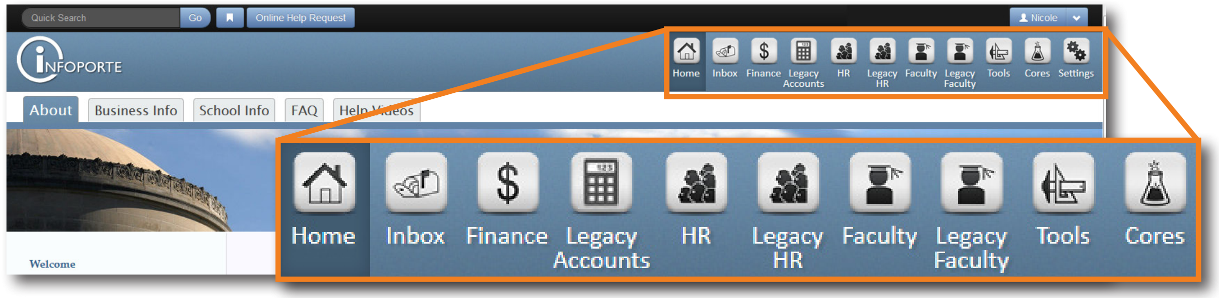
3. Type your Onyen and Onyen password, and click on the **Sign in** button.





The InfoPorte Welcome Page

Like many web-based applications, InfoPorte has a navigation bar on every page in the system. Use the buttons in the navigation bar, the tabs, and the drop-down lists to navigate to InfoPorte's functions. From any page, click on the **Home** link to return to the Welcome page.



This table briefly describes each button on the navigation header.

This application...	Is used to ...
Inbox	View and edit your calendar, review Finance, HR, Faculty, or Cores requests awaiting approval.
Finance	Cost code, initiate financial requests, and run and review financial reports.
Legacy Accounts	Run and review reports on summarized legacy information.
HR	Perform employee evaluations, initiate HR requests, and run and review HR reports.
Legacy HR	Run and review reports on summarized legacy information.
Faculty	Track faculty productivity, faculty reviews, initiate faculty requests, and run and review faculty reports.
Student	View information about students, and run and review student reports.
Tools	Create and track contracts, reserve rooms and IT equipment, manage parking, and access the Data Dictionary.
Cores	Purchase items and services, consolidate sales for, and manage and edit cores.

Navigating in InfoPorte

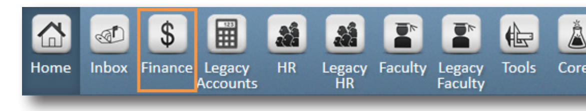
This table defines the different InfoPorte navigation buttons, links, and tabs you'll encounter as you move through the system.

Quick Search	Enter a specific account, employee name, or PID, to be directed to the appropriate screen.
Favorites button	Use the Favorites button to enter and save report search criteria.
Navigation link	Click this link to go directly to a specific page from anywhere in the system.
Dashboard tab	If you are a faculty member, use this tab to review a summary of your accounts and employees. (This tab is the first tab faculty members see when they log in.)
About tab	Find general information about InfoPorte on this tab, as well as Release Notes, the User Guide, and the Admin Guide.
Business Info	Go to this tab to find definitions of terms and codes used throughout InfoPorte.
School Info	Go to this tab to review custom content specific to your school. For example, the School of Pharmacy lists Business Workflows on this page.
FAQ tab	Go to this tab for a list of answers to your questions before submitting a Remedy ticket.
Online Help Request link	Click this link to submit a Remedy ticket.
Feedback	Click this link to provide feedback about InfoPorte.

Accessing Finance Reports

To access finance reports, follow these steps:

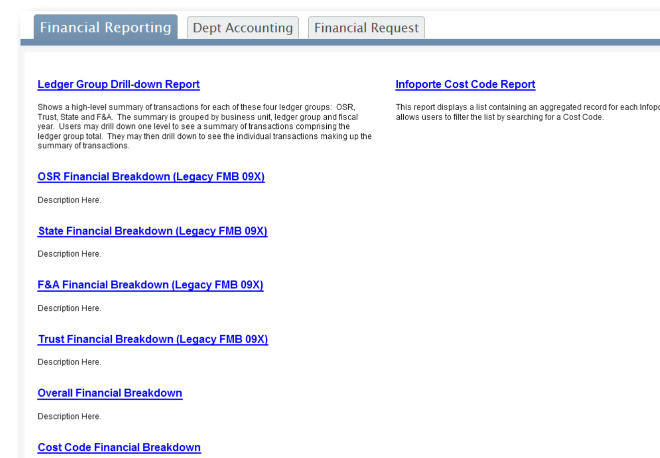
1. Click on the **Finance** button in the navigation bar at the top of the page.



Result: InfoPorte displays a set of tabs related to Finance. InfoPorte defaults to the Financial Reporting tab. From within the Financial Reporting tab, InfoPorte displays links for some frequently-used financial reports.

2. Click the link for the report you need.

Result: The SAS Visual Analytics reporting tool launches and you can begin to select your report criteria.

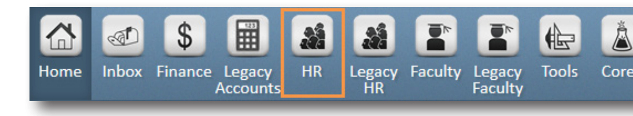


3. Select your report criteria and run your report.

Accessing HR Reports

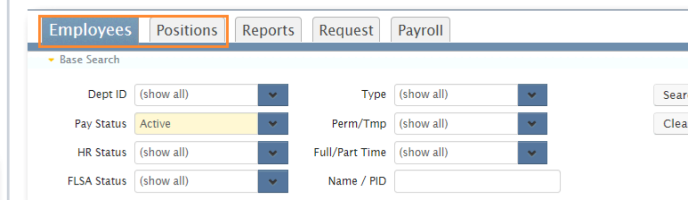
To access HR Reports, follow these steps:

1. Click on the **HR** button in the navigation bar at the top of the page:



Result: InfoPorte displays a set of tabs related to HR and Payroll. InfoPorte defaults to the Employees tab.

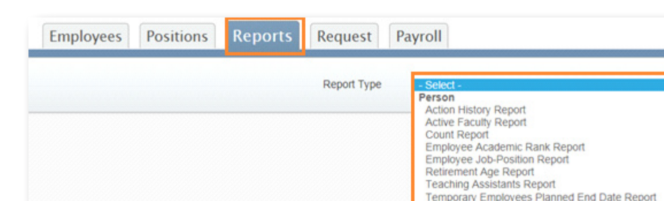
2. If you want to run either employee or position reports, select the appropriate tab and enter your search criteria. Otherwise, go to Step 3.



3. To see additional HR-related reports, click on the **Reports** tab.

Result: InfoPorte displays the Report Type field.

4. In the Report Type field, choose the type of report you need.
5. Choose your report criteria and run your report.



Helpful Tip

Ctrl + Click to open InfoPorte in more than one tab.

If you have more than one monitor, drag a tab to the other monitor to see InfoPorte side-by-side.