

Release 7.0, May 12, 2017

Summary of the Changes

- A series of fixes and improvements have been implemented so that salary and fringe benefit projections are more accurate in InfoPorte. ([click here for more details](#))

Finance

- The advanced search feature on the GL Activity tab now lets you search by accruals or actuals. ([click here for more details](#))

Cores

- The Cores list is updated so that only active Cores show in the Cores list. ([click here for more details](#))
- On the Order Confirmation page when placing an order from a Core facility, it is easier to find the project that is paying for the order in the “Use Project (Grant) Billing” dropdown selector because they’ve been updated and alphabetized. ([click here for more details](#))
- When placing a Core facility order without logging in to InfoPorte, the field that lets you choose whether to email or print invoices is set to “Emailed Invoice is Acceptable,” but you can change it if you need to. ([click here for more details](#))
- The Core Sales Report now shows the date the order was completed as well as the date the order was created. ([click here for more details](#))
- When you use a project ID to run the NIH report, the report now shows more details about each award. ([click here for more details](#))

Tools

- When you need to reserve a room in the Tools application, the Outlook calendar is now filled in with existing reservations when you click the View Schedule button.
- When you need to reserve a room in the Tools application, the IT Equipment tab has been removed. (You saw this tab when reserving rooms.)

Need help with InfoPorte? Resources are available:

- Go to ccinfo.unc.edu and click the Featured Resources tab to view the Finance and HR reporting quick reference guides.
- Go to ccinfo.unc.edu and click the Training tab to access computer-based training.
- Call the help desk at 962-HELP or submit a help ticket at help.unc.edu.

Salary and Fringe Benefit Projections are Now More Accurate

With this release, salary and fringe benefit projections are now more accurate in InfoPorte. The biggest improvement you'll notice is that contract and grant (OSR) funds projections are now calculated with budget end dates in mind. The projections are also now updated every weeknight (except for holidays). As in the past, the system calculates projected fringe benefits and taxes based on each person's employee group (such as EHRA Non Faculty or SHRA Permanent) and the type of funding sources set up for them.

This change completes a series of changes and fixes that have been implemented over the last few weeks. These changes are:

- The Account totals are now correct on the ledger rollup reports.
- The Account subtotals on the Transactions tab have been corrected.
- Cost share is now included in projections on the ledger rollup reports for State, F&A and Trust funds.
- Projections are no longer duplicated on the BMS Report or the Salary Projections Report on the Payroll tab.
- Reports show the full amount of projections. Before this release, the system only displayed projections for the month selected.

Read more about the Salary Projections [here](#).

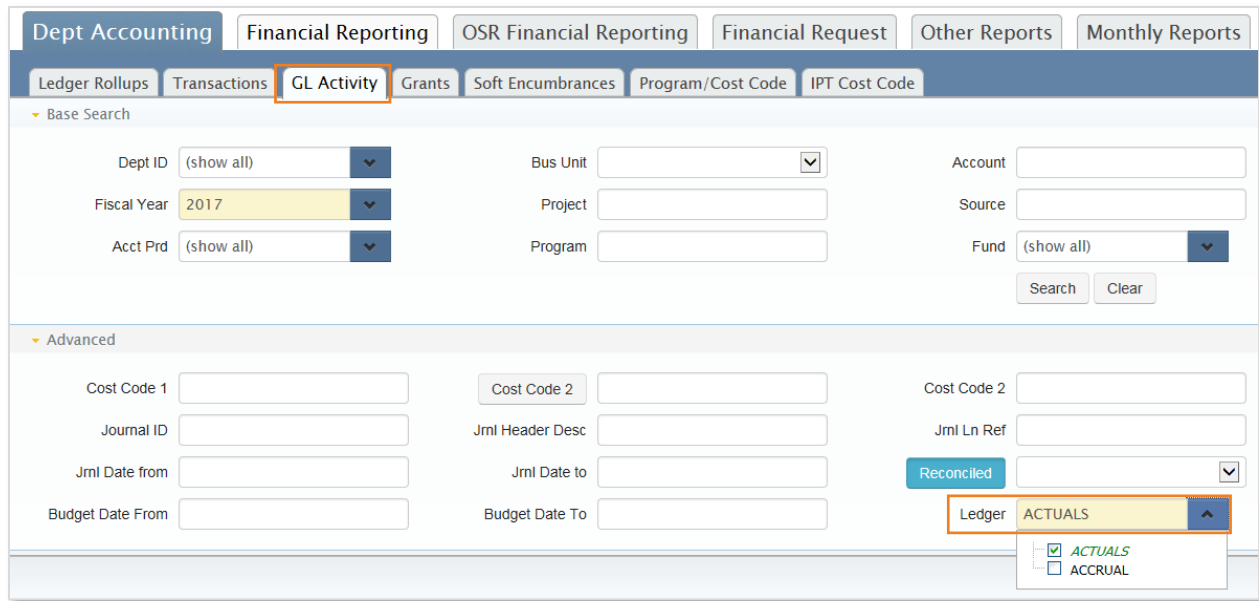
Search by Accruals in the GL Activity Tab in the Advanced Search

The Accruals ledger shows both expense and revenue transactions that have not yet posted to the GL Actuals ledger. For expense transactions, these are amounts that the University is committed to spend (for example, purchase orders) and for revenue transactions, amounts that the University hasn't yet received payment for (for example, an invoice has been sent). At the request of some campus Finance staff, an option has been added to the GL Activity tab to let you search both the GL Actuals ledger and the accruals ledger to see the complete picture of your school or division's spending for a specified period of time. This new option is available when you are using the advanced search on the GL Activity tab, not the base search.

Note: If you search with both **Actuals** and **Accrual** checked and then clear the filters on the base search, both ledgers remain checked. You have to uncheck **Accrual** to see only results from the GL Actuals ledger.

Need help with InfoPorte? Resources are available:

- Go to ccinfo.unc.edu and click the **Featured Resources** tab to view the Finance and HR reporting quick reference guides.
- Go to ccinfo.unc.edu and click the **Training** tab to access computer-based training.
- Call the help desk at 962-HELP or submit a help ticket at help.unc.edu.



Only Active Facilities in the Cores List Go to the Order Page

The Cores area of InfoPorte lets you order goods and services provided by facilities here at the University. The list of facilities has been cleaned up so that inactive Core Facilities no longer show in the list. For three of the Core facilities, you can no longer place orders through InfoPorte. Instead, InfoPorte sends you directly to their websites when you click on them:

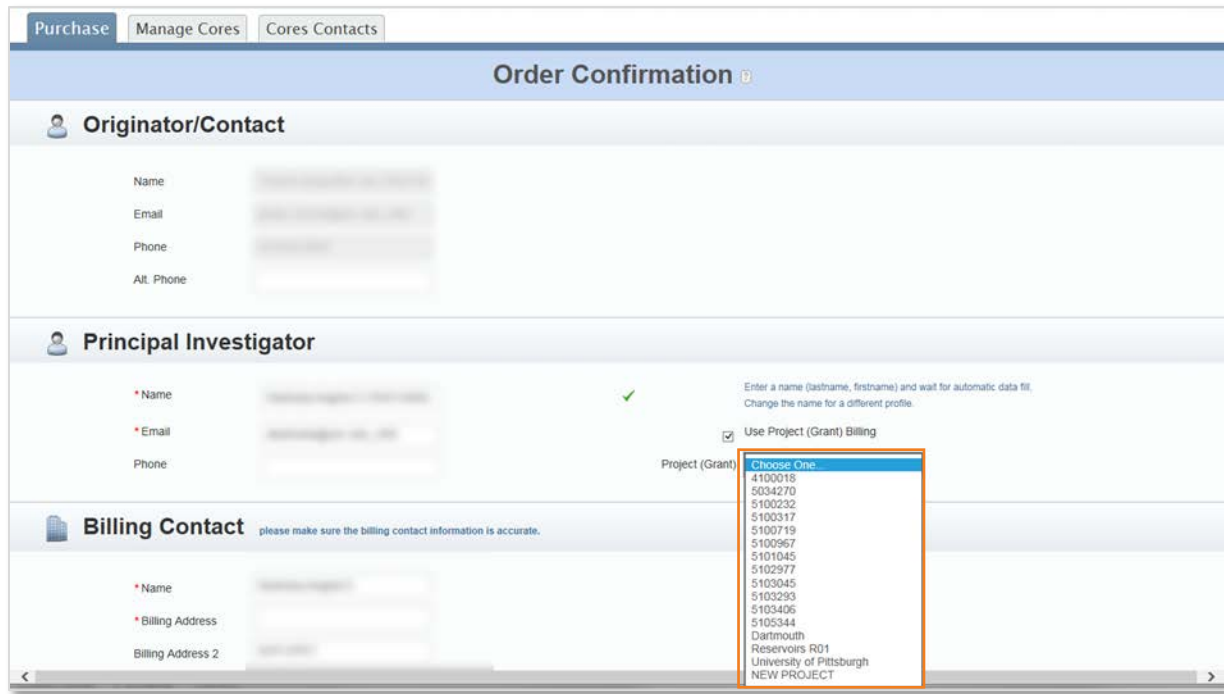
- Flow Cytometry
- Hooker Imaging Core
- Histology Research

Easier to Find the Grant that is Paying for an Order from a Cores Facility

When placing an order from a Cores facility that a grant or sponsored project is paying for, the options on the Order Confirmation page for the “Use Project (Grant) Billing” dropdown list have been cleaned up. Up to now, the projects for a PI were listed in the order they were entered, which sometimes made finding the correct project difficult. The projects are now in alphabetical order.

Need help with InfoPorte? Resources are available:

- Go to ccinfo.unc.edu and click the Featured Resources tab to view the Finance and HR reporting quick reference guides.
- Go to ccinfo.unc.edu and click the Training tab to access computer-based training.
- Call the help desk at 962-HELP or submit a help ticket at help.unc.edu.



Order Confirmation

Originator/Contact

Name
Email
Phone
Alt. Phone

Principal Investigator

* Name
* Email
Phone

Enter a name (lastname, firstname) and wait for automatic data fill.
Change the name for a different profile.

Use Project (Grant) Billing

Project (Grant) Choose One

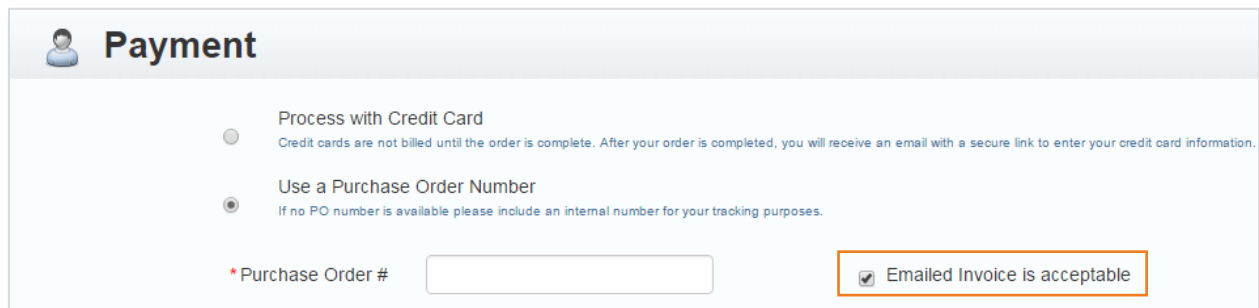
- 4100018
- 5034270
- 5100232
- 5100317
- 5100719
- 5100967
- 5101045
- 5102977
- 5103045
- 5103293
- 5103406
- 5105344
- Dartmouth
- Reservoirs R01
- University of Pittsburgh
- NEW PROJECT

Billing Contact please make sure the billing contact information is accurate.

* Name
* Billing Address
Billing Address 2

Default Option Changed for External Orders Paid by Purchase Order in the Cores

You don't have to be logged in to InfoPorte to place an order through the Cores application. If you place an order without being logged in and you're paying for that order by purchase order, the option to send you an emailed invoice rather than a printed one is checked by default. This is because most customers are okay with an emailed invoice and this reduces the time it takes to check out.



Payment

Process with Credit Card
Credit cards are not billed until the order is complete. After your order is completed, you will receive an email with a secure link to enter your credit card information.

Use a Purchase Order Number
If no PO number is available please include an internal number for your tracking purposes.

* Purchase Order #

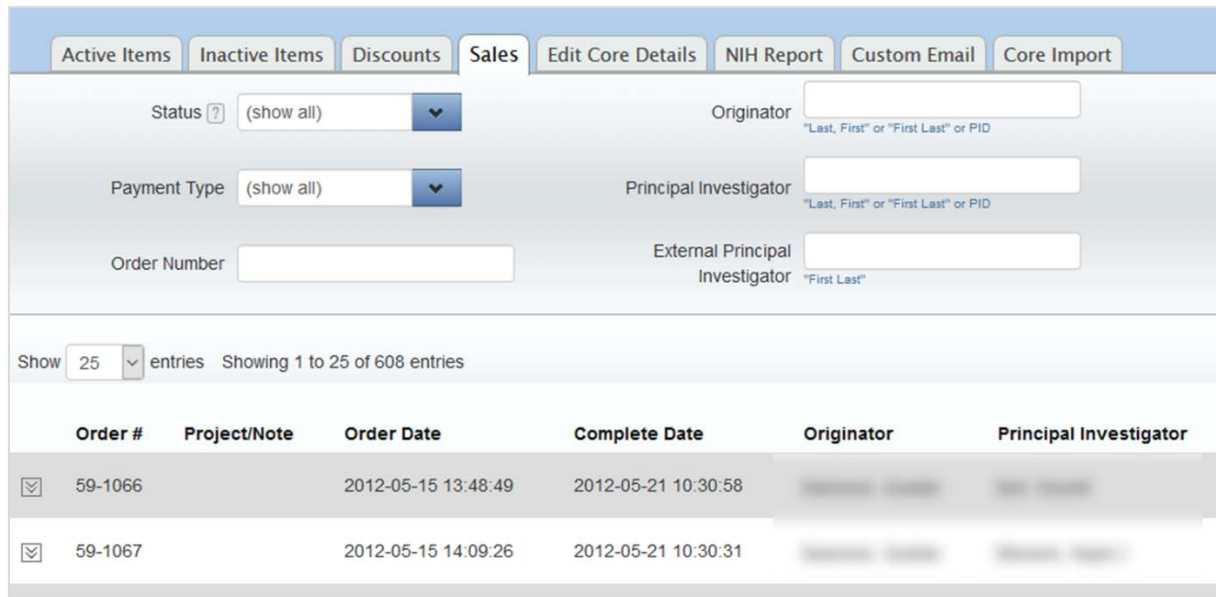
Emailed Invoice is acceptable

Need help with InfoPorte? Resources are available:

- Go to ccinfo.unc.edu and click the Featured Resources tab to view the Finance and HR reporting quick reference guides.
- Go to ccinfo.unc.edu and click the Training tab to access computer-based training.
- Call the help desk at 962-HELP or submit a help ticket at help.unc.edu.

Core Sales Report Now Shows the Date Orders were Completed

If you have access to Manage Cores and you run the Sales Report for a Core, a new Complete Date column shows the date the order was completed. This way you can see both the date the order was created and the date the order was completed. The completed date for an order is usually the date the order was invoiced.



The screenshot shows the 'Sales' tab in the InfoPorte system. It includes filters for Status, Payment Type, and Order Number, along with search fields for Originator, Principal Investigator, and External Principal Investigator. Below the filters, it indicates 'Showing 1 to 25 of 608 entries'. The table below has the following columns: Order #, Project/Note, Order Date, Complete Date, Originator, and Principal Investigator. Two rows are visible, both with checked selection boxes.

Order #	Project/Note	Order Date	Complete Date	Originator	Principal Investigator
<input checked="" type="checkbox"/>	59-1066	2012-05-15 13:48:49	2012-05-21 10:30:58		
<input checked="" type="checkbox"/>	59-1067	2012-05-15 14:09:26	2012-05-21 10:30:31		

More Details About Awards on the NIH Report

If you have access to Manage Cores and you run the NIH Report, you now see four more columns on the second page of the report:

This column ...	Shows ...
Account Description	The title of the award as entered in RAMSeS
Account	The award number as entered in RAMSeS
Agency	The company or agency that is funding the project
Award	Either: <ul style="list-style-type: none"> The NIH-assigned award number if the project is funded by the NIH The contract number as entered in ConnectCarolina

Need help with InfoPorte? Resources are available:

- Go to ccinfo.unc.edu and click the Featured Resources tab to view the Finance and HR reporting quick reference guides.
- Go to ccinfo.unc.edu and click the Training tab to access computer-based training.
- Call the help desk at 962-HELP or submit a help ticket at help.unc.edu.

InfoPorte System Updates



Purchase Manage Cores Cores Contacts													
Active Items Inactive Items Discounts Sales Edit Core Details NIH Report Custom Email													
Cores 11 COIBD - Advanced Anal											Search Clear		Account Info >
Show 25 entries Showing 1,201 to 1,220 of 1,220 entries											First Previous 45 46 47 48 49 Next Last		< Order Info >
Order #	Order Date	Originator	Purchase Agent	Status	Complete Date	Original Total	Discounts	Adjustments	Total Billed	Item ID	Item	Component	Quantity/Hours
38-79782	02/20/2017			Posted	02/20/2017	\$1950.00	0.0%	\$0.00	\$1950.00				
38-79782	02/20/2017			Posted	02/20/2017					FACS (SH800)	FACS User Training (COIBD only)		2
38-79783	02/20/2017			Posted	02/20/2017	\$200.00	0.0%	\$0.00	\$200.00				
38-79783	02/20/2017			Posted	02/20/2017					FACS (SH800)	FACS Operator Labor (per hour)		2
38-79783	02/20/2017			Posted	02/20/2017					FACS (SH800)	FACS Time (2 hour minimum)		1
38-79786	02/20/2017			Posted	02/20/2017	\$1803.25	0.0%	\$0.00	\$1803.25				

Purchase Manage Cores Cores Contacts													
Active Items Inactive Items Discounts Sales Edit Core Details NIH Report Custom Email													
Cores 11 COIBD - Advanced Anal											Search Clear		< Order Info >
Show 25 entries Showing 1,201 to 1,220 of 1,220 entries											First Previous 45 46 47 48 49 Next Last		< Order Info >
Order #	Payment Type	Payment Details	Account	Account Description	PI PID	PI Name	Agency	Award	Major Award Agency	Continuation Account			
38-79782	Account	5103496 / 426401	A16-0853-001	Towards Genetic Airway Epithel			Cys Fibrosis/Pulm Res Admin	RANDEL15XXX					
38-79782													
38-79783	Account	5101886 / 423501	A16-0107-001	SUBAGCT/KECK PURVIS SUPPLIES			Genetics						
38-79783													
38-79783													
38-79786	Account	8034436 / 425801	A14-1264-001	Gene Regulation Via Chromatin			Genetics	6.R01.H0056655.16.17					