InfoPorte System Updates

Release 9.0, June 28, 2019

Summary of the Changes

New Access Request Tool

- A small pilot group of Access Request Coordinators (ARCs) have access to use this revamped tool. Later this summer, all ARCs will have access to this tool. (click here for more details)

Access Page Updates

- The Access Page (found under Settings > Access) now has additional information to help Access Request Coordinators (ARCs) and InfoPorte Administrators when they're looking at access information for employees. (click here for more details)

Finance

- The ID for Payroll Adjustment Accounting Tool (PAAT) transactions has been added to four Finance reports. (click here for more details)

- The Chartfield Lookup report now has a status field and status filter. (click here for more details)

HR/Payroll

- A column description has been changed on the Salary Alignment Report to more accurately reflect the information that's displayed. (click here for more details)

Student Administration

- Just like we did on the Term Enrollment report, the Major Academic Plan filter drop down has been updated on the Degree Candidates report and the Degree Recipients report. (click here for more details)

- You can now export the Cumulative Degree GPA and Cumulative Degree Units from the Degree Recipients report. (click here for more details)

Cores

- The NIH Report now has a date filter that defaults to current month. (click here for more details)

- You can now export the Payment Details column when you export the Sales report to Excel. (click here for more details)

Miscellaneous

- We also have behind the scenes bug fixes and improvements to infrastructure going into InfoPorte as part of this release.

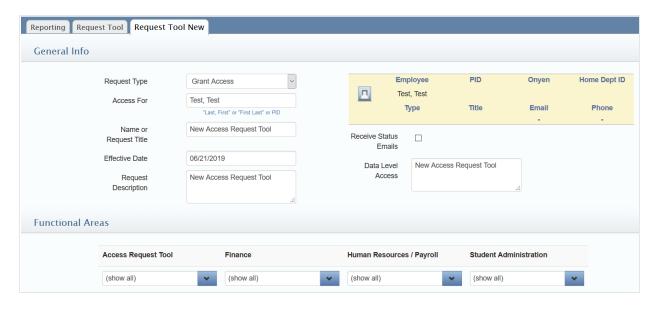**Need help with InfoPorte? Resources are available:**

- Go to ccinfo.unc.edu and click the Reporting tab to view the Finance, Student 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.

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New Access Request Tool

Later this summer, we'll be rolling out a revamped Access Request Tool that will let you submit one request even if the employee needs access to Finance, HR/Payroll, and Student Admin pages. You'll submit one electronic request, called the main request, and the system will create sub-requests that each go through their separate approval process. Each piece of access will be granted individually, so employees who need access won't have to wait on all access to be approved before they receive any access.

We'll provide training for all ARCs before the system goes live for everyone later this summer, so be on the lookout for an invitation after the pilot.
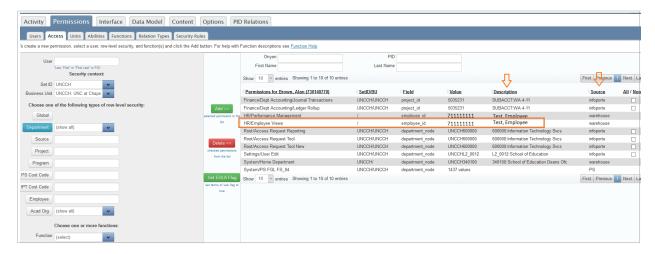
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Updates to the InfoPorte Access Page

We've made these changes to the Access page (found under Settings > Permissions > Access):

Added a description column to provide more information about what access an employee has in InfoPorte. For example, if an HR Rep has access to Employee Views for one employee, the employee's name is shown in the description field. All InfoPorte access that an employee has now shows on this page, along with a column that indicates where that access was granted from.
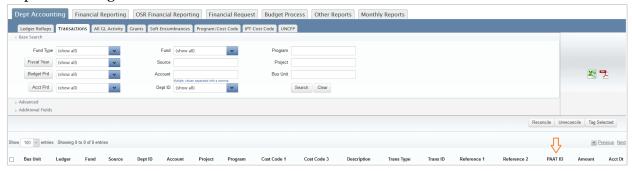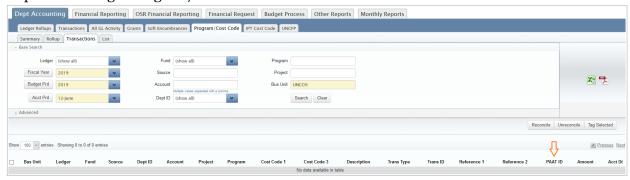
Finance – Four Finance Reports Now Have a PAAT ID Column

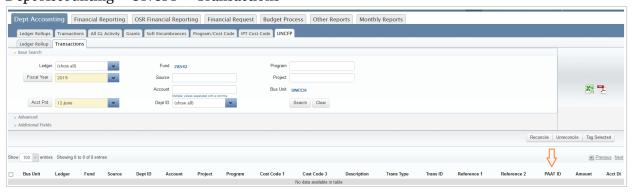To help with reconciling, the PAAT transaction ID has been added to the following Finance reports within InfoPorte:

Dept Accounting > Transactions

Dept Accounting > Program/Cost Code > Transactions

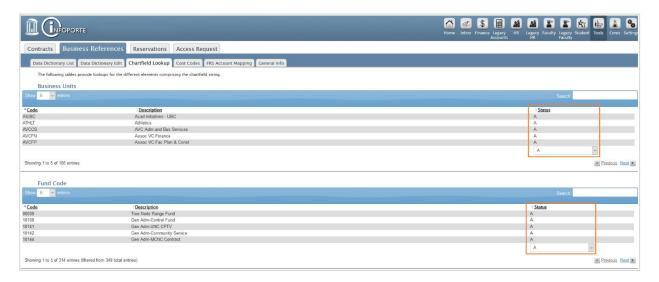

Dept Accounting > UNCFP > Transactions

Monthly Reports

The PAAT ID is now shown in the Reference 1 field.

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Finance – Chartfield Lookup Report Now Includes a Status Field and Filter

The Chartfield Lookup report (found under Tools > Business References) now has a Status field and a status filter for each of the chartfield values to let you know which chartfield values are active or inactive.

HR/Payroll – Updated Column Heading on the Salary Alignment Report

The column description has been updated from FTE Salary to 1.0 FTE Salary on the Salary Alignment report. This reduces confusion when an employee has a pro-rated salary, since the column shows what the salary would be at 1.0 FTE.
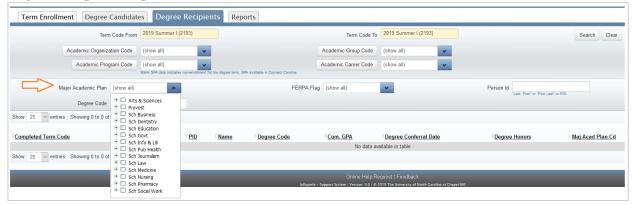
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Student Administration – Update to the Major Academic Plan Filter

The Major Academic Plan filter drop down has been updated on the Degree Candidates report and the Degree Recipients report to make it easier to use. This update is similar to the update that was made on the Term Enrollment report in May.

Degree Candidates report

Degree Recipients report

Student Administration – Two New Fields Can Be Exported on the Degree Recipient Report

The Degree Recipients report now has two new fields, the Cumulative Degree GPA and the Cumulative Degree Units, available to be included when you export the report to Excel.
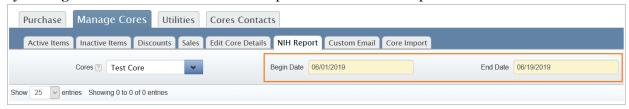
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Cores – NIH Report

The Cores NIH Report by default pulls data from the beginning of Infoporte in 2012. This data reaches back to legacy (FRS) data and is causing extra processing when most of the time we won't need data from that far back.

By adding a date filter that defaults to the previous month the report will take less time to load.

Cores – Sales Report

In the Sales report, the Payment Details column that appears online has been added to the excel export as well. This field displays the account if paid internally via a Chartfield or it displays a Purchase Order number if paid by that method.