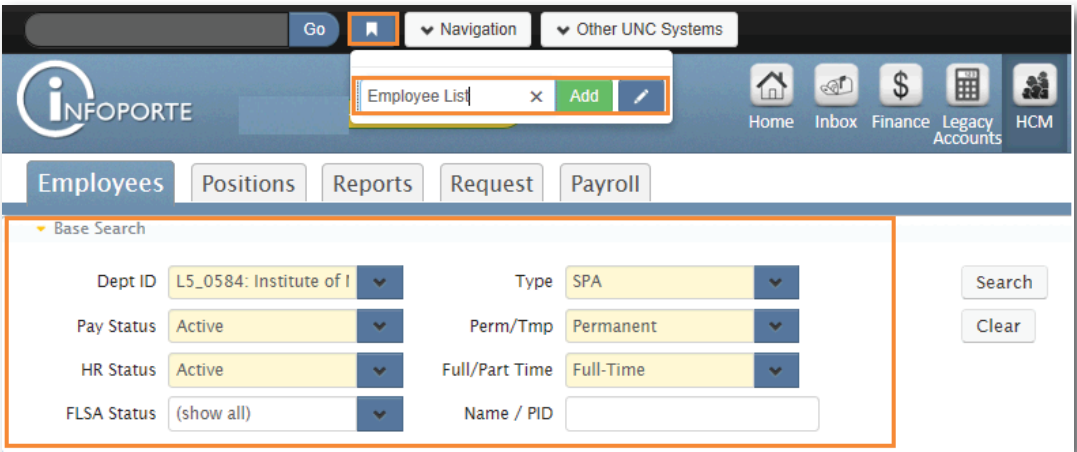


## Saving Report Parameters

If you have certain reports that you need to run over and over, you can save time by saving the parameters you selected. 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: The window displays that allows you to create a name for your parameters.
2. Enter a name for your parameters.
3. Click on the **Add** button.

Result: Once you save your parameters, you can click on the Favorites button to display of list of saved parameters.



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

# 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 to Infoporte from ConnectCarolina. Information is also copied from other key systems the University uses, including RAMSeS (for contract and grant information), eCert (for effort reporting) and SPOTS (for information on 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?

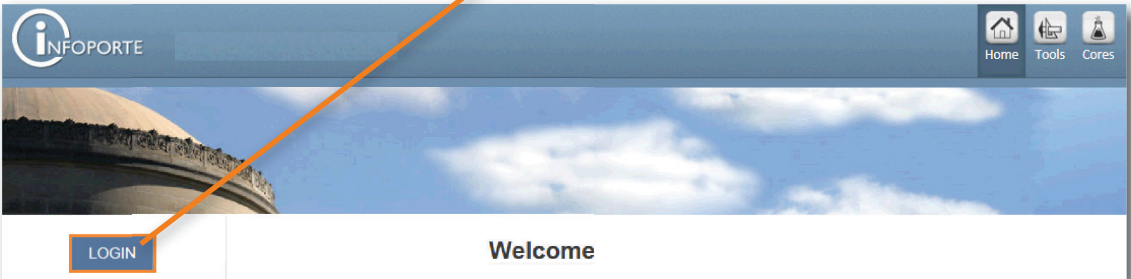
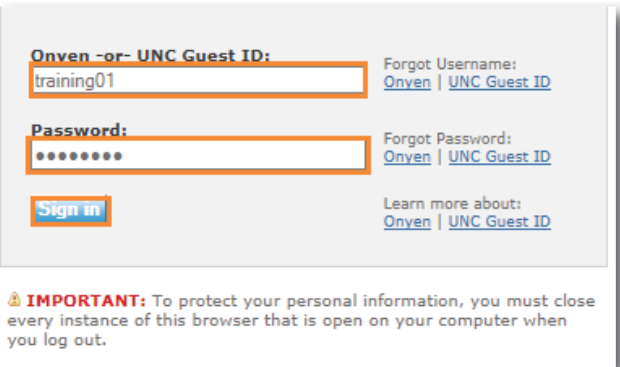
You access Infoporte from the ConnectCarolina home page (also called the "portal") at <http://connectcarolina.unc.edu>. The link to Infoporte is on the left side of the page.

### Logging into InfoPorte

Follow these steps to log in to Infoporte:

1. Click the Infoporte link on the ConnectCarolina home page.
2. Click on the **LOGIN** button.
3. Type your Onyen and Onyen password, and click the **Sign in** button.

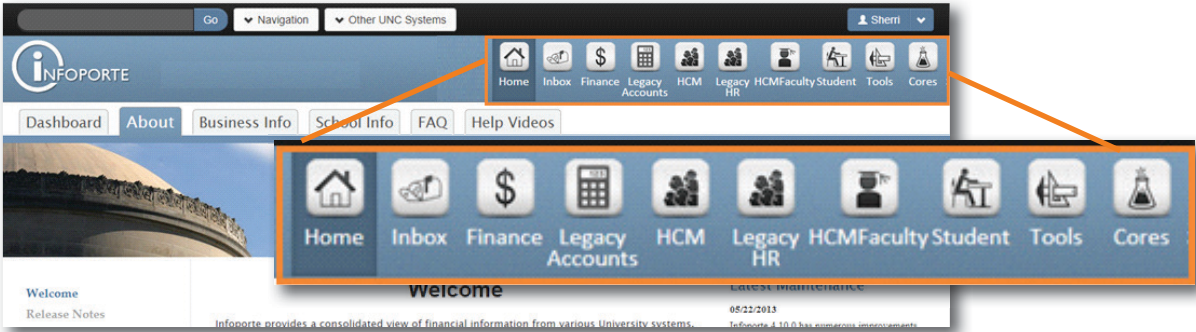
Result: Infoporte displays the sign on window.



The InfoPorte Welcome Page

Like many other web-based applications, Infoporte has a navigation bar that is available on every page in the system. You use the buttons in the navigation header, the

tabs, and the links in the drop-down lists at the top to navigate to the Infoporte functions. From any page, you can click 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, HCM, HCM Faculty or Cores requests awaiting approval.
Finance	Cost code, initiate financial requests, run and review financial reports
Legacy Accounts	Run and review reports on summarized legacy information.
HCM	Perform employee evaluations, initiate HR requests, run and review HR reports.
Legacy HR	Run and review reports on summarized legacy information.
HCM Faculty	Track faculty productivity, faculty reviews, initiate faculty requests, run and review faculty reports.
Student	View information about students, 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, manage and edit cores.

Navigating in InfoPorte

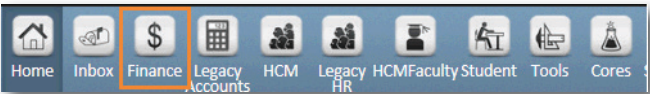
This table defines the different Infoporte navigation buttons, links or tabs you'll encounter as you move through the system.

Quick Link	Enter a specific account, employee or PID to be directed to the appropriate screen.
Favorites Button	Use the Favorites button to enter and save search criteria for a report.
Navigation Link	Click this link to go directly to a specific page from anywhere in the system.
Other UNC Systems Link	Use this link to access other UNC systems.
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 help ticket.
Feedback	Click this link to provide feedback about Infoporte.

Accessing Finance Reports

To access finance reports, follow these steps:

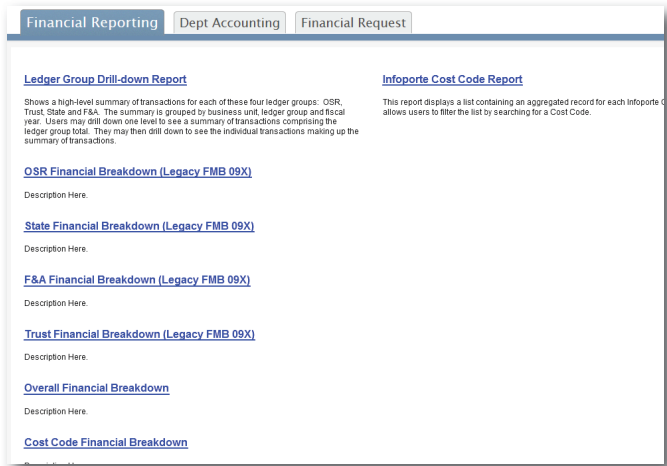
- Click on the **Finance** button in the navigation bar at the top of the page.



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.

- 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.

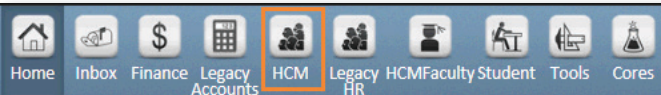


- Select your report criteria and run your report.

Accessing HR Reports

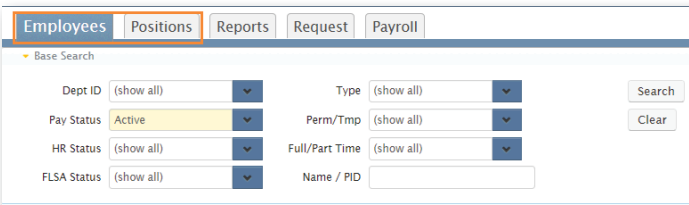
To access HR Reports, follow these steps:

- Click on the **HCM** 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.

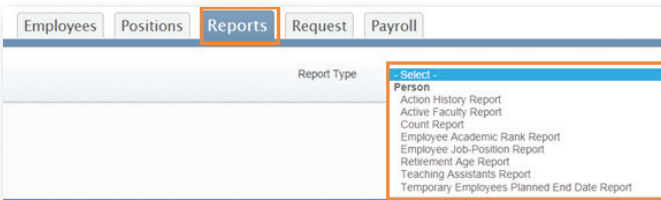
- If you want to run either employee or position reports, select the appropriate tab and enter your search criteria. Otherwise, go to Step 3.



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

Result: Infoporte displays the Report-Type field that allows to you to display a list of additional HR reports.

- In the Report Type drop-down list, choose the type of report you need.



- Enter your selection criteria and run your report.