Quick Reference Guide to HR and Payroll Reporting

Notes:

• The information in InfoPorte is one day behind ConnectCarolina (PeopleSoft).

• For general information on InfoPorte reports, refer to the resource document titled Reporting in InfoPorte or take the CBT titled Introduction to InfoPorte.

Key Terms	
SAS	• A small group of people have access to the SAS reports in InfoPorte.
Bio-Demo Information	• Basic information about a person, such as name, address, email, phone number, gender, and ethnicity.

Report & Menu	Description	What Does It Help Me Do?	Available Training
HR Reports			
InfoPorte: HR > Employees	• Shows detailed information about employee jobs and individual employees. • Lets you filter by department, pay status, HR status, name, PID, and other information. Additional filters, such as gender and tenure status are available in the Bio-Demo and Incumbent search areas. • Lets you see more information by clicking on an employee's name.	• See employee information for your direct reports. • See the chartfield string used for an employee's pay. • Export employee information to Excel, including basic employee information as well as bio-demo, job, and funding information.	• HR and Payroll Reporting with InfoPorte – Part 1 (classroom training) • InfoPorte Reporting: HR Reports (CBT)

InfoPorte: HR > Positions	• Shows detailed information about both filled and vacant positions. • Lets you filter by department, position status, position number, job code, and other information. The Advanced search provides additional filters, such as vacancy status. • Lets you see more information by clicking on the position number.	• Search for vacant positions in your department. • See which chartfield strings are funding a position. • Export position information to Excel.	• HR and Payroll Reporting with InfoPorte – Part 1 (classroom training) • InfoPorte Reporting: HR Reports (CBT)
InfoPorte SAS: HR > Reports > Funding > Funding Report • Funding Report – Budget • Funding Report – Actuals • Funding Source End Date Access is limited to those who have been authorized	**This report is currently under construction.**		

InfoPorte SAS: HR > Reports > Person > Action History Report Access is limited to those who have been authorized	• Shows the action history for all employees in your unit for all actions since October 1, 2014. • Lets you select one or more job actions to see a list of employees who have had that action within the time period you specify. • Lets you select an employee to see a list of actions for that employee within the time period you specify. Note: Actions dated prior to October 1, 2014 do not display on this report.	• Generate a list of employees with a recent action or a recent action/action reason combination. For example, all employees on an unpaid leave of absence for personal reasons since January 1, 2015. • See the action history for a specific employee.	• InfoPorte Reporting: HR Reports (CBT)
InfoPorte SAS: HR > Reports > Person > Active Faculty Report Access is limited to those who have been authorized	• Shows active faculty members and the dates their job information was entered in the system. • Lets you filter by HR status, job code, academic rank, and other information.	• Generate a list of active faculty members with the dates the employees were assigned to their departments and their current jobs.	

InfoPorte SAS: HR > Reports > Person > Count Report • Profile • Gender Metrics • Ethnicity • Job Family Access is limited to those who have been authorized	• On the Profile tab, shows bio-demo information on employees, such as ethnicity and gender. • Lets you filter by HR status, primary job, job function, and other information. • On the remaining tabs, shows gender, ethnicity, and job family information based on the selected filters. • Graphically shows gender profile, ethnicity profile, pay group by gender, and job family information. Note: Ethnicity is based on the Current IPEDS (Integrated Postsecondary Education Information System).	• Pull diversity information for a specific department. • See diversity information in different ways by using the four tabs on the report. • Gather information when applying for contracts and grants.	• HR and Payroll Reporting with InfoPorte – Part 2 (classroom training)
InfoPorte SAS: HR > Reports > Person > Employee Academic Rank Report Access is limited to those who have been authorized	• Provides academic rank information for faculty members. • Lets you filter by HR status, job code, academic rank, and other information.	• Create a list of faculty members and their academic rank. • Pull faculty start dates.	

InfoPorte SAS: HR > Reports > Person > Employee Job-Position Report • Employee Job • Average Salary by Pay Group Access is limited to those who have been authorized	• On the Employee Job tab, shows information about employee jobs and pay groups. • Lets you filter by HR status, job family, pay group, and other information. • Graphically shows the percentage of regular and temporary employees, the percentage of full and part-time employees, and the percentage of hourly and salaried employees. • On the Average Salary by Pay Group tab, shows average salary by business unit across pay group. • Graphically shows average salary by pay group for regular and temporary employees and by business unit.	• See information about an employee's most recent action and current position. • Find an employee's time in service date.	

InfoPorte SAS: HR > Reports > Person > Expected End Date Report Access is limited to those who have been authorized	• Computes expected end date based on the difference between the planned end date and today's date. • Lets you filter by regular/ temporary, job function, academic rank, and other information. • Graphically shows the number of employees who have an expected end date and the number who don't have an end date. • Graphically shows approaching end dates by grouping expected end dates into buckets, such as Expected End Date Less than 30 days from System Date and No End Date.	• Monitor expected job end dates for EPA students so you can enter any necessary ePARs before the students' end dates. • Determine which employees may be up for review for reappointment, promotion, or tenure. • Determine when to send end date notifications.	• HR and Payroll Reporting with InfoPorte – Part 2 (classroom training) • End of Semester Processing of Students
InfoPorte SAS: HR > Reports > Person > FTE Info for Affordable Care Act Report Access is limited to those who have been authorized	• Shows FTE information for Affordable Care Act purposes.	• Create an Affordable Care Act report with FTE information.	

InfoPorte SAS: HR > Reports > Person > Faculty Analysis Report • Faculty Demographics • Adjunct Summary • Full Professor Summary • Faculty Tenure Status Access is limited to those who have been authorized	• On the first three tabs, shows demographic information for all faculty members, adjuncts, and full professors. • On the last tab, shows faculty tenure status. • Lets you filter by primary job, job family, academic rank, and other information. • Graphically shows full and part-time percentages, gender percentages, and ethnicity counts. • Graphically shows adjuncts by academic rank, faculty by college/school, and faculty tenure status.	• Create a report with demographic information for faculty members, or for adjuncts or full professors. • See faculty tenure status.	
InfoPorte SAS: HR > Reports > Person > Faculty Zero salary Zero FTE Report Access is limited to those who have been authorized	• Lists contingent workers with a zero salary, zero FTE, or both. • Lets you filter by employee/ contingent worker, job family, academic rank, and other information. • Graphically shows the departments with the most contingent workers and the academic ranks with the most contingent workers. Note: Based on the selected filters, you may see fewer than five bars in these graphs.	• Create a list of contingent workers who have zero salary or zero FTE. Note: Filter by an Org Relationship Type of CWR or by an employee classification of FCW to see only contingent workers.	

InfoPorte SAS: HR > Reports > Person > Hire Report • Total Hires • Gender Ratio • Ethnicity Hire Ratio Access is limited to those who have been authorized	• Shows a list of actions for all employees in your unit. Note: Choose the action of Hire and one or more action reasons to create a Hire Report. • Lets you select a specific time period for the report. Note: InfoPorte has information about hires entered in ConnectCarolina since October 1, 2014. • Graphically shows the activity by year based on the filters you choose. • Lets you create lists and graphs to show gender and ethnicity information.	• Create a list of employees hired within a time period since October 1, 2014. • Create lists of other actions.	

InfoPorte SAS: HR > Reports > Person > Job Action and Position History Report • Job History • Position History Access is limited to those who have been authorized	• On the Job History tab, shows the action history for all employees in your unit. • Lets you filter by action, action reason, primary job, and other information. • Lets you choose one or more job actions to see a list of employees who have had that action within the time period you specify. • Lets you select an employee to see a list of actions for that employee within the time period you specify. • On the Position History tab, shows the action history for all positions in your unit. • Lets you select one or more position action reasons to see a list of positions with that action reason within the time period you specify. • Lets you select a position number to see a list of changes to that position within the time period you specify. Note: Actions dated before October 1, 2014 do not display on this	• Create a list of all occurrences of a specific job action within a time period since October 1, 2014. • Search for all actions for a selected employee within a time period since October 1, 2014. • Create a list of all occurrences of a specific position action reason within a time period since October 1, 2014. • Search for all actions for a selected position within a time period since October 1, 2014.	

InfoPorte SAS: HR > Reports > Person > Overtime Compensation Report • YTD Overtime Compensation • MTD Overtime Compensation Access is limited to those who have been authorized	**This report is currently being researched.**		
InfoPorte SAS: HR > Reports > Person > Retirement Age Report • Retirement Age • Average Retirement Age Access is limited to those who have been authorized	• On the Retirement Age tab, computes age at the time of retirement. Note: The action defaults to 'Termination' and the action reason defaults to 'Retirement'. • Lets you filter by employee ID, name, HR status, job code, and other information. • On the Average Retirement Age tab, computes the average age at retirement. Note: Based on the selected filters, you may see fewer than five bars in this graph.	• Create a list of recently retired employees and their ages at retirement. Note: This report is designed to work only with the Termination/Retirement action/action reason combination. The reporting team does not recommend that you filter this report using any other combination of action/action reason.	
InfoPorte SAS: HR > Reports > Person > Salary Alignment Report Access is limited to those who have been authorized	• Shows FTE salary for employees in your unit. • Provides market rates and ranges for SPA and EPA non-faculty positions. • Lets you filter by employee ID, name, HR status, job code, and other information.	• Ensure the salary offered to a candidate does not create equity issues. • Create a salary report to use during the annual raise process.	• HR and Payroll Reporting with InfoPorte – Part 2 (classroom training)

InfoPorte SAS: HR > Reports > Person > State Funded Position Vacancy Report • All Vacancies • Vacancies > 6 Months Access is limited to those who have been authorized	• Provides a report on state-funded vacancies for positions and appointments. • Lets you filter by funding type. • Summarizes vacancies by budget and purpose code. • The second tab shows positions and appointments open for six months or longer. Note: The State fund range for UNCCH is 20101-22193. The State fund range for UNCGA is 10100-15199.	• Create a list of positions and appointments funded by the State that are currently vacant.	

InfoPorte SAS: HR > Reports > Person > Teaching Assistants Report • Teaching Assistant Summary • Teaching Assistant Details Access is limited to those who have been authorized	• The summary tab provides summarized information on teaching assistants' pay. • Lets you filter by HR status, full/ part-time, academic rank, and other information. • Graphically shows a count of teaching assistants at the various HR business units. • The details tab provides detailed information by business Unit or department, such as name and annual rate of pay. • Graphically shows the top five business units for teaching assistants, based on the selected filters. Note: Based on the selected filters, you may see fewer than five bars in these graphs.	• Create a report that shows summary information about the graduate teaching assistants in your department. • Create a list of graduate teaching assistants in your department.	
InfoPorte SAS: HR > Reports > Person > Temporary Employees Planned End Date Report • All Employees • Temp Employees Appointment Length Greater than 6 Months Access is limited to those who have been authorized	• On the All Employees tab, shows the expected job end dates and the assignment end date. • Lets you filter by temporary/ regular, job function, job code, and other information. • On the second tab, shows information about temporary employees whose initial appointment is longer than six months.	• Create a list of the expected end dates for employees in your department.	
Payroll Reports			

InfoPorte: HR > Payroll > Earnings Distribution	• Shows payroll information for each employee by chartfield string, with a separate line for each earnings code, employer deduction, and employer tax. • Lets you filter by a range of pay dates, as well as by project, program, fund, source, department or employee. Advanced filters let you search for a specific pay period, account, or funding department.	• See detailed payroll information for prior pay periods for a group of employees or for an individual employee. • Individually see different types of earnings codes, employer deductions, and employer taxes.	• HR and Payroll Reporting with InfoPorte – Part 2 (classroom training) • InfoPorte Reporting: Payroll Reports (CBT)

InfoPorte: HR > Payroll > Prelim Report (formerly called the Check Register)	• Shows earnings and employee deductions. • Lets you validate employees' paycheck information prior to confirmation. • Shows employee's gross earnings for all earnings codes in the Earnings field. • Shows the sum of the employee's deductions for FICA, federal, and state taxes in the Total Taxes field. • Shows the sum of all other deductions from the employee's pay in the Total Deducts field. Note: During the payroll lockout, the Chk Status field shows as Prelim, and the Chk # and Form ID fields are blank. After payroll is confirmed, the Chk Status field shows as Finalized, and the report shows values in the Chk # and Form ID fields.	• Ensure a new employee will receive his or her first check. • Ensure an employee's paycheck is calculated correctly.	• HR and Payroll Reporting with InfoPorte – Part 2 (classroom training) • InfoPorte Reporting: Payroll Reports (CBT)

InfoPorte: HR > Payroll > Summarized Payroll	• Shows payroll information for each employee summarized by funding source and employee. • Lets you filter by a range of pay dates, department, or employee.	• See summarized payroll information for prior pay periods for a group of employees or for an individual employee. • See summarized information for different types of earnings codes, employer deductions, and employer taxes. • Determine the total number of employees being paid on a particular chartfield.	• HR and Payroll Reporting with InfoPorte – Part 2 (classroom training) • InfoPorte Reporting: Payroll Reports (CBT)
InfoPorte SAS: HR > Payroll > Salary Projections Access is limited to those who have been authorized	• Replaces the encumbrance calculation in ConnectCarolina. • Calculates salary projections using an employee's most recent compensation multiplied by the remaining pay periods in the fiscal year. • Shows salary projections for employees in your unit, but not hourly students and hourly temporary employees. • Lets you filter by pay period begin or end date, chartfield, employee, or other information.	• Determine the amount of salary projected to be paid between now and the end of the fiscal year.	• HR and Payroll Reporting with InfoPorte – Part 2 (classroom training) • InfoPorte 6.4 Release Notes
ConnectCarolina: Pending Transactions Report Main Menu > HR/Payroll Menu > Payroll Acct Adj. Tool (PAAT) > Review Pending Transactions	• Shows a list of all pending PAAT transactions for a department or school • Includes those with In Progress and Needs Approval statuses • Each transaction listed has a link to the adjustment.	• Check the approval status of PAAT transactions	• Guide for Using the Payroll Accounting Adjustment Tool • PAAT Webinar

ConnectCarolina: Suspense Transaction Report Main Menu > HR/Payroll Menu > Payroll Acct Adj. Tool (PAAT) > Current Suspense Charges	• Shows a list of charges for a department or school that have gone to the suspense account, broken down by employee and pay period	• Check an employee's payroll that is sitting in your suspense account	• Guide for Using the Payroll Accounting Adjustment Tool • PAAT Webinar
InfoPorte: Labor & Expense Report HR > Payroll > PAAT > • The report has three tabs: o Labor & Expenses Summary o Labor & Expenses Detail o Labor & Expenses Detail Codes	• Shows the funding sources of labor expenses, by summary and detail • Mirrors the Labor Expense Report that was available in the Retroactive Funding Transfer Application (short-term retro tool) • Summary tab shows expenses by department • Detail tab breaks out expenses by employee • Detail Codes tab shows expense broken out by wages and taxes	• Review the funding sources of your labor expenses • Check a specific pay cycle distribution for an employee	• Guide for Using the Payroll Accounting Adjustment Tool • PAAT Webinar