

**Release 6.7.1**, July 15, 2016

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## Summary of the Changes

### Finance

- Report data on the ledger rollup tabs loads noticeably faster due to performance enhancements.
- The OSR ledger rollup now let you filter by project status. ([click here for more information](#))
- You now have the option of showing soft encumbrances on the OSR Ledger Rollup tab. ([click here for more information](#))
- Cost share salary projections now calculate correctly on the state, F&A, and trust ledgers. ([click here for more information](#))
- The account totals on the Transactions tab are now correct for certain departments affected by a bug. In some cases, the account totals were erroneously summing to zero.

### Grants

- Budget balances on the grants dashboard now include projections. ([click here for more details](#))
- A fix has been made so compensation for certain hourly employees doesn't show as "n/a" under Personnel Details on the Grant Details page. ([click here for more details](#))
- The Grant Profile page now has both a contract and a project search filter. Also, you can now show salary projections. ([click here for more details](#))

### HR

- The State Funded Position Vacancy report, available on the HR Reports tab, shows vacancies for state-funded positions and appointments. With this new release, it no longer shows abolished positions. The look of the report hasn't changed; you just won't see positions that have been abolished.
- When printing the Employee Profile page, available on the HR employees tab, the employee's name and PID now show at the top of the report; no more having to write that information on it by hand.

### InfoPorte Inbox

- The Last Action column for requests in your InfoPorte inbox is now accurate. The date represents the last time the request was modified.

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

- Go to [ccinfo.unc.edu](http://ccinfo.unc.edu) and click the Featured Resources tab to view the Finance and HR reporting quick reference guides.
- Go to [ccinfo.unc.edu](http://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](http://help.unc.edu).

## Filter by Project Status on the OSR Ledger Rollups

The OSR Ledger tab in InfoPorte shows budget balances for projects. When you are searching on the OSR Ledger tab, you can now filter by project status. By default, all statuses are selected except for closed, ended, and reporting.

The screenshot shows the 'OSR Ledger' tab selected. Under the 'Project Status' filter, a dropdown menu is open, displaying the following options with their selection status:

- C: Closed (I)
- O: Open (A)
- A: Approved (A)
- B: Budgeted (A)
- F: Forecasted (A)
- H: Hold (I)
- E: Ended (A)
- R: Reporting (A)

These are the statuses you can choose from:

Project Status	Description
<b>Closed</b>	A project that is closed in ConnectCarolina, or one that hasn't started yet because it's being paid for under a Letter of Guarantee (LOG) by the department in charge until the sponsor decides whether to approve the award.
<b>Open</b>	An active project that can have expenses posted to it.
<b>Approved</b>	A project in an award proposal that was approved in RAMSeS and sent to ConnectCarolina. OSR hasn't generated the award yet or set up the project in ConnectCarolina.
<b>Budgeted</b>	This field is not currently used at UNC.
<b>Forecasted</b>	This field is not currently used at UNC.
<b>Hold</b>	This field is not currently used at UNC.
<b>Ended</b>	This field is not currently used at UNC.
<b>Reported</b>	This field is not currently used at UNC.

## Soft Encumbrances

You can also now choose to show soft encumbrances on the OSR Ledger Rollup tab. Soft encumbrances are anticipated expenses entered in InfoPorte on the Soft Encumbrances tab and are only visible in InfoPorte. If you check the Show Soft Encumbrances box before searching, InfoPorte adds a Soft Encumbered and a IPT Balance column. The IPT Balance (InfoPorte Balance) column is calculated by taking your available balance and subtracting any soft encumbrances. Be aware that InfoPorte hides the Expenses YTD and Expenses MTD columns when viewing soft encumbrances.

In the example below, InfoPorte takes the available balance (\$525,845.24) and subtracts the amount that has been soft encumbered (\$555) to calculate an InfoPorte balance of \$525,290.24. Keep in mind that the InfoPorte balance only exists in InfoPorte and is not reflected in the ConnectCarolina balance.

Available Balance	Soft Encumbered	IPT Balance
-92,121.00	0.00	-92,121.00
525,845.24	555.00	525,290.24

## Projected Balances on the Grants Dashboard

Researchers looking at the Grants Dashboard, available on the home screen in InfoPorte, will notice that the columns now show projected balances. Projected balances are calculated by taking a project's available balance and then subtracting projected personnel earnings for the life of the project as well as soft encumbrances entered in InfoPorte for the project. The Projected Balance (Direct only) column subtracts overhead and administrative costs from the projected balance. Projected balances give a more accurate representation of how much money a project really has left available. Note that the Projected Balance column comes before the Projected Balance (Direct only) column. These columns are reversed on the Grant Profile page.

Dashboard			
About Business Info School Info School Repo			
Project	Projected Balance	Projected Balance (Direct only)	
Project names obscured.	0.00	0.00	
Project names obscured.	0.00	0.00	
Project names obscured.	0.00	0.00	
Project names obscured.	0.00	0.00	
Project names obscured.	2,649.20	1,790.00	

## Salary Projections with Cost Share

On grants, cost share refers to the portion of expenses that the University will pay on behalf of the grant. When you choose to show projections in InfoPorte, you can see a projected balance minus the expected salary and fringe benefits for the life of the project. Previous to this release, the projections were only showing the portion paid by the grant and not the portion paid by the University. With this release, the projected portion paid by the University is now subtracted from your projected balances. The cost share portion is paid with state, F&A, and trust funds, so your projected balances on those ledger rollups in InfoPorte will now be subtracting those costs.

## Compensation for Hourly Employees on Grants

The personnel details section of the Grant Details page lets you see the amount and percentage a person's salary is being paid for by a grant. A bug has been fixed that was causing the **Grant %** column to display "n/a" for some hourly employees.

**Before the fix:**

Personnel Details			
Name	Grant Amount	Grant %	Cost Share Amount
Blaine A. Brown, Director	18,720.00	n/a	0.00
Carol Brown, Chief	9,716.32	11.0%	0.00

**After the fix:**

Personnel Details			
Name	Grant Amount	Grant %	Cost Share Amount
Blaine A. Brown, Director	18,720.00	100.0%	0.00
John Brown, Chief	75,004.80	100.0%	0.00

## Grant Profile Page Lets You Filter by Contract and Show Salary Projections

The Grant Profile page now lets you filter by contract. As before, you can still search for a grant if you know the project ID, but this new search field gives you more flexibility to search for grant information.

Grant Profile | OSR Campus Reports

▼ Base Search

Project

**Contract**

Start Date

Status  ▼

Another new feature on the Grant Profile page is the ability to show salary and fringe benefits projections. You can click the “Show Projected” button, and InfoPorte displays salary and fringe benefits projections as well as soft encumbrances. When you choose to show projections in InfoPorte, you can see a projected balance with the expected salary earnings and soft encumbrances subtracted from the original available balance. The Projected Balance (Direct only) column subtracts overhead (indirect) costs from the projected balance. Projected balances give a more accurate representation of how much money a project really has left available.

**Show Projected**

First Previous **1** Next Last

re-encumb	<u>Projected Earn</u>	<u>Projected Fringe</u>	<u>Soft Encumb</u>	<u>Projected Balance (Direct only)</u>	<u>Projected Balance</u>
0.00	152,961.42	32,627.75	0.00	-33,564.14	37,225.58