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1 InfoPorte Administration Guide

This chapter covers:

- InfoPorte Administration Guide Overview

- Additional Resources

InfoPorte Administration Guide

Overview

This guide describes your role and responsibilities as an InfoPorte Administrator. InfoPorte is the primary tool the University uses to display, analyze, and work with ConnectCarolina information. Some schools and divisions also use InfoPorte to perform administrative tasks like reserving equipment and managing staff evaluations.

Some users, such as Principal Investigators for contracts and grants, receive access to InfoPorte automatically based on the role set up for them in RAMSeS (the tool used to manage contracts and grants up to the award stage). But most faculty and staff who need access will need to provide you with an access form. They will specify the details about the access they require on the form, and will have the form signed by leadership in your school or department. When you receive a complete and authorized form, you'll use the form to modify the person's access using a tool in InfoPorte.

About InfoPorte Permissions

As an InfoPorte Administrator, you will add and remove user permissions. Permissions determine what InfoPorte users can do in the system. Permissions give faculty and staff access to only the parts of InfoPorte they will use to do their jobs, without granting them any extra access they don't need.

InfoPorte allows administrators to grant access to a specific function or a particular screen at various levels of detail:

- Major entity level (such as UNC-Chapel Hill, UNC Foundations, or UNC General Administration)

- School or division level (such as Finance and Administration, School of Medicine, College of Arts and Sciences, Workforce Strategy)

- Department level (such as Department of Medicine, Facilities Services, Chemistry Department)

- Sub-department level

- Individual project level (Grants)

- Individual employee level (such as John Doe or Jayne Smith)

As with other University systems, InfoPorte users must follow all related policies and regulations when they access and use InfoPorte. Everyone who uses InfoPorte has to sign the Terms of Use agreement found at https://itsapps.unc.edu/ITSSelfStudy/CCTermsOfUse. In addition, faculty and staff are required to report any unauthorized access or misuse of University information contained in InfoPorte immediately to the Information Technology Services (ITS) Information Security Office by calling the UNC ITS Help Desk (919-962-HELP).

InfoPorte Administrator vs. ConnectCarolina Access Request Coordinator

The InfoPorte Administrator gives faculty and staff access to most InfoPorte reports and tools. The ConnectCarolina Access Request Coordinator (or "ARC" for short), uses a tool in InfoPorte to give faculty and staff access to ConnectCarolina. Sometimes the same person in a department holds both roles, and other times different people hold the roles.

Two exceptions are Student Administration reporting and Finance SAS Visual Analytics reports. Your school or division's ARC processes requests for these reports, because of approvals from the Office of the University Registrar and the Finance division.

Additional Resources

- For more about the ConnectCarolina Access Request Coordinator's role, see the *Access Request Coordinator Guide*.

2 Adding or Removing InfoPorte User Permissions

This chapter covers:

- Adding or Removing InfoPorte User Permissions Overview

- Steps - Adding InfoPorte User Permissions

- Steps - Removing InfoPorte User Permissions

Adding or Removing InfoPorte User Permissions

Overview

To give access in InfoPorte, you choose:

- the person you are giving access to,

- what part of InfoPorte you need to give access to and

- what information the person should be able to see when they use that part of InfoPorte.

You remove access the same way.

When specifying the information a person should see, access for most Finance users is set at the department level, but you can also limit access to a particular project, program, or cost code, or any combination. For access to Human Resources reports, you can specify which employees the person should have access to see in InfoPorte. The person requesting access should include this information at the bottom of the Access Request Form.
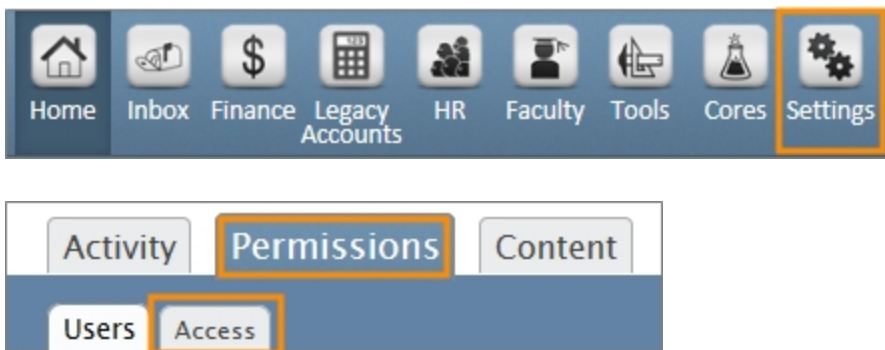
Menu Path

Main Menu > Settings > Permissions > Access

Adding InfoPorte User Permissions

Follow these steps:

1. Navigate to Settings > Permissions > Access

Result: The system displays the Access tab, which lets you modify InfoPorte user permissions.
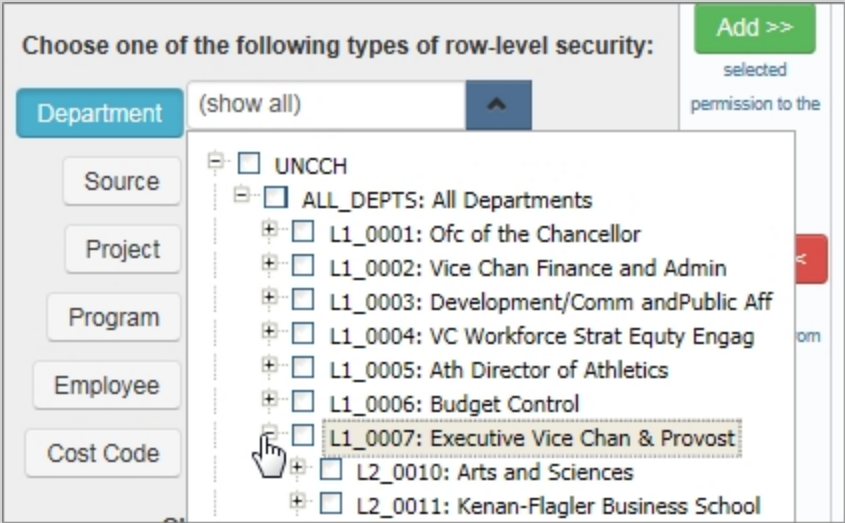
2. Complete the fields on the Access tab.

    Note: If one of the fields is blank, when you click the **Add** button or the **Remove** button, you will receive an error message prompting you to fill in the blank field.
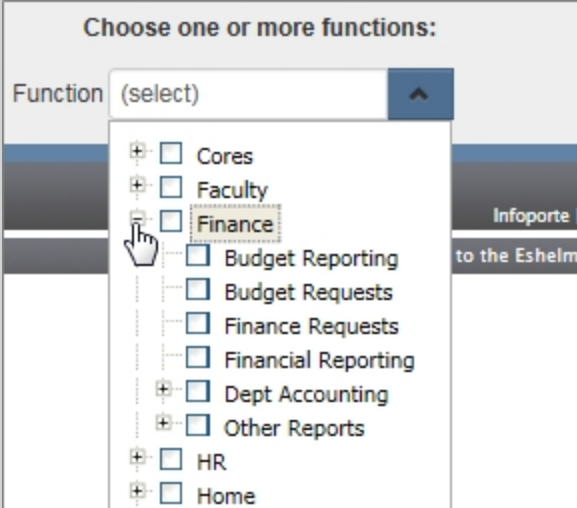
In this field:	Do the following:
User	Look up, or enter, the name of the person you are giving access to. You can enter the name in the formats "Last, First", "First Last", or as a PID.
	Note: If you pause while entering text in the User field, names in the system that match what you have typed so far display below the text box. Choose the person you need from the list.
	Result: The system displays the user's name, Onyen, and PID on the right side of the screen, along with any permissions they already have.
Set ID	Select **UNCCH** to give the person access to see information for the University, **UNCGA** for General Administration, or choose a foundation to give the person access to see information for that foundation.
Business Unit	Select **UNCCH** for the University, **UNCGA** for General Administration, or a foundation business unit.

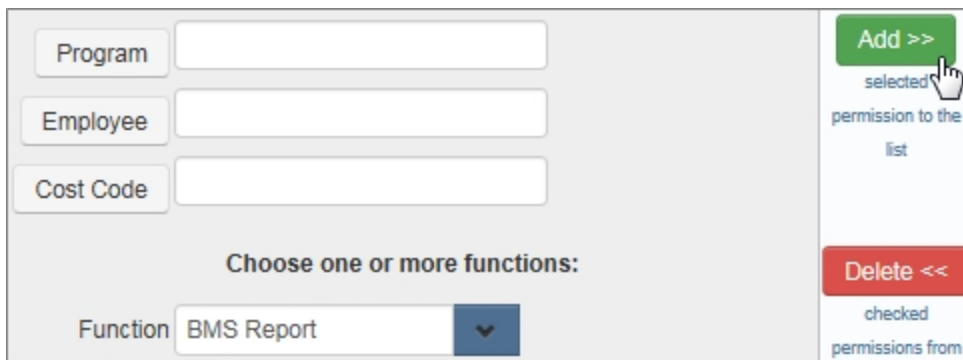3. Fill in only one of the following fields.

Note: The person requesting access can make multiple department selections on the request form, but if you need to grant access to a variety of chartfields, you will need to "Add" the access several times.

In this field:	Do the following:
Department	Click the down arrow to show a "tree" of departments, and choose the departments the person should have access to see in InfoPorte. Click the plus signs to drill down from higher to lower levels until you find the departments you're looking for. Mark the checkbox beside a department to select it.
Source	If you want to limit the person's access to a particular source, type the source in this field. **Note:** There is no spot for source information on the Access Request Form, but you may receive it separately.
Project	If you want to limit the person's access to a particular project, type the project ID in this field.
Program	If you want to limit the person's access to a particular program, type the program ID in this field.
PS Cost Code	If you want to limit the person's access to a particular ConnectCarolina cost code, type the cost code in this field.
IPT Cost Code	If you want to limit the person's access to a particular InfoPorte cost code, type the cost code in this field.
Employee	If you want to limit the person's access to a particular employee, type the employee ID in this field.

4. Fill in the **Function** field.

In this field:	Do the following:
Function	Choose the parts of InfoPorte the person should have access to by clicking the arrow to display the function tree, which matches the checkboxes on the Access Request Form. Click the plus signs to drill down from higher to lower levels until you find the functions you're looking for. Mark the checkbox beside a function to select it.

5. Click the **Add** button in the center pane to assign the permission to the user.
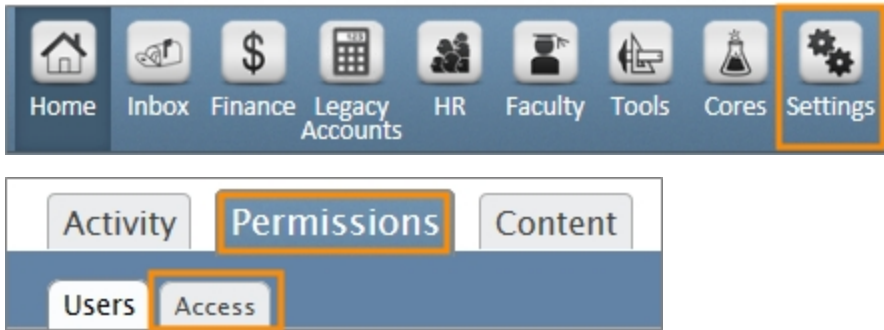
Result: The selected permission is added to the list on the right side of the screen.

Removing InfoPorte User Permissions

Follow these steps to remove user permissions in InfoPorte:

1. Navigate to Settings > Permissions > Access

2. Look up, or enter, the user's name. You can enter the name in the formats "Last, First", "First Last", or as a PID.

   Note: If you pause while entering text in the User field, names in the system that match what you have typed so far display below the text box. Choose the person you need from the list.

   Result: The user's name, Onyen, and PID display to the right of the form, along with a list of their system permissions.
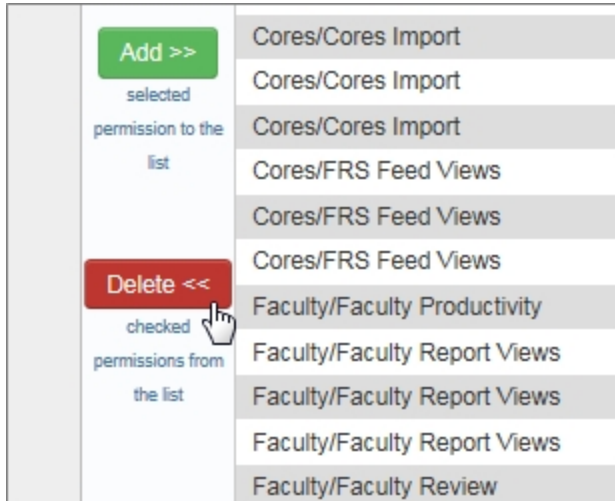
3. In the list on the right side of the screen, mark checkboxes beside the permissions you need to remove:

   Notes:

   - You can only remove your own school's permissions. Refer to the list of Administrators in the InfoPorte Data Dictionary and contact the appropriate InfoPorte Administrator to request removal of other school's permissions.

   - To mark all of the displayed checkboxes at once, click the **All** link at the top of the rightmost column. To clear all the displayed checkboxes at once, click the **None** link.

4. Click the **Delete** button in the center pane.

Result: The marked permissions no longer display in the list on the right side of the page, and effective immediately, the person no longer has access to those functions in InfoPorte.

3 Locating the InfoPorte Access Request Form

This chapter covers:

- Locating the InfoPorte Access Request Form Overview

- Steps - Locating the InfoPorte Access Request Form

Locating the InfoPorte Access Request Form

Overview

Faculty and staff might ask you where they can find the form they need to complete and return to you so you can set up or modify their InfoPorte access. Even before getting access to InfoPorte, prospective users can find the InfoPorte Access Request Form in the system without having to log in.

Faculty and staff will complete this form and obtain signatures from school or division management to authorize their access request. You will use the information on these completed forms to modify InfoPorte permissions so faculty and staff can access the tools and information they need to do their work.

Menu Path

Main Menu > Tools > Data Dictionary > General Info

Steps - Locating the InfoPorte Access Request Form

Follow these steps:

1. Navigate to the InfoPorte Welcome page at http://infoporte.unc.edu.

2. Click the **Tools** application button at the top of the page, and then the **Data Dictionary** tab and the **General Info** tab.
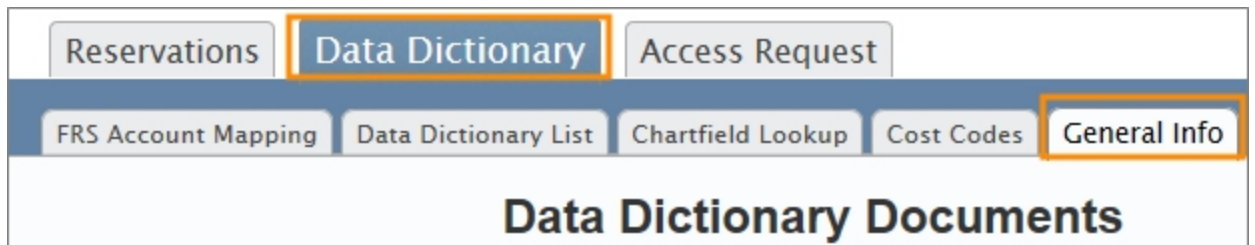
3. Find the **Infoporte Access Request Form** in the left column.

4. Click the corresponding **Download** link in the right column of that row.

Result: Your browser gives you the option to save or open a blank copy of the InfoPorte Access Request Form.

Note: Since the form is an Acrobat PDF document, instead of printing and completing the form in writing, the person requesting access can complete most of the form electronically before printing it for signatures.

4 Locating the List of InfoPorte Administrators

This chapter covers:

- Locating the List of InfoPorte Administrators Overview

- Steps - Locating the List of InfoPorte Administrators

Locating the List of InfoPorte Administrators

Overview

If a colleague doesn't direct faculty and staff to you, most of them will learn how to contact you by viewing a file available in the InfoPorte data dictionary that lists the names of all InfoPorte Administrators and ConnectCarolina Access Request Coordinators (ARCs), listed by department and school. Even before getting access to InfoPorte, any prospective user can find the Administrator/Coordinator list in the system without having to log in.

As an InfoPorte Administrator, your name and contact information should be included on that list so faculty and staff in your area know who you are and how to contact you.

Note: To add or change your information on the list of InfoPorte Administrators, submit a help ticket to the InfoPorte team.

Menu Path

Main Menu > Tools > Data Dictionary > General Info

Steps - Locating the List of InfoPorte Administrators

To locate the list of InfoPorte Administrators and ConnectCarolina ARCs, follow these steps:

1. Navigate to the InfoPorte Welcome page at http://infoporte.unc.edu.

2. Click the **Tools** application button at the top of the page, and then the **Data Dictionary** tab and the **General Info** tab.
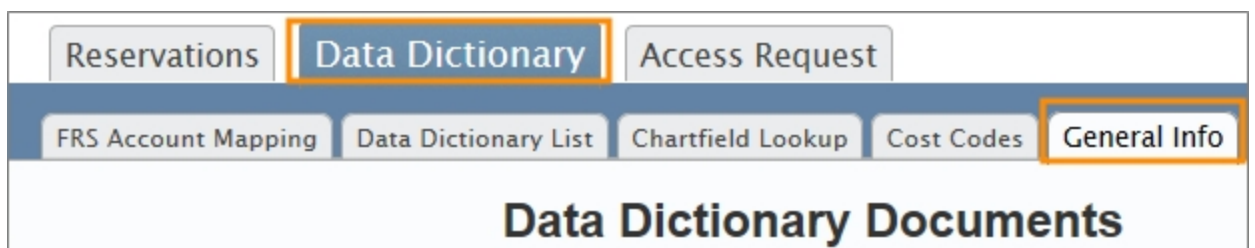
3. Find the Infoporte Admin/Access Request Coordinator list in the left column.

4. Click the corresponding Download link in the right column of that row.

Result: Your browser gives you the option to save or open an Excel file that contains the names and contact information for each area's InfoPorte Administrators and ARCs.

Department/School	Applies to this department range:	Infoporte Administrator	Access Request Coordinator (ARC)		
General Administration					

5 Appendix

The appendix includes:

- Functions Table

Appendix. Functions Table

The table below provides a description of each choices for the Functions field.

InfoPorte Function	Description
Cores	A specialized tool used by centers within the University for selling products and services. This was formerly known as "recharge centers." Only specified users already familiar with this application require access to the higher functions within this area.
Faculty	
Faculty Productivity	Allows access to the Faculty Activity Report, Curvita and Faculty Details
Faculty Report Views	Allows access to the Faculty Review History
Faculty Review	Allows access to perform actions on faculty requests and reviews. User may participate in the review process and receive email notifications of impending reviews
Faculty Solicit	Allows access to solicit feedback on a faculty request by clicking the Solicit button and forwarding the request to a third party for input
TimeTrex	Allows access to the third-party TimeTrex system
Finance	
Budget Reporting	Allows access to view reports on budget amounts and actions
Budget Requests	Allows access to initiate or act on actions to increase or reduce budgets
Finance Requests	Allows access to initiate actions in the finance system
Financial Reporting	Allows access to view SAS reports allowing customization of data similar to many of the legacy FBM 09X reports
Dept Accounting -- Cost Code Edit	Allows access to create and edit InfoPorte cost codes
Dept Accounting -- Cost Code Tagging	Allows access to associate or "tag" individual transactions with a given cost code
Dept Accounting -- Soft Encumbrances	Allows access to enter, edit, or remove soft encumbrances against available funds in the finance system
Dept Accounting -- Journal Transactions	Allows viewing of detailed transactions within the journal system
Dept Accounting -- Ledger Rollup	Allows access to view summary data for ledgers, such as F&A, State, OSR and Trust

InfoPorte Function	Description
Other Reports -- BMS Report	Allows access to the BMS Report and Other Finance Reports Tab (BMS Reports)
Other Reports -- BMS Summary	Allows access to the BMS Summary Report and BMS Summary Trust Reports
HR	
Employee Performance Mgmt Full	
Evaluations	Allows access to the review / evaluation process for employees and determines if user receives email notifications of upcoming reviews
HCM Payroll PAAT	
Performance Management	Allows access to the reduced HCM Performance Mangement (2 overall ratings) only as used in 2014-2015. All managers shouldautomatically have access to create evaluations for their own department
Positions	Allows access to view and edit details of positions within the HR system
HR Reporting	Allows access to a prepackaged selection of SAS Reports
Requests	Allows access to initiate or act on HR actions in the InfoPorte system, such as creating or modifying positions, new employment, and other actions
Employee Views	Allows access to view employee information for the specified range of individuals or departments
Home	
Dashboard	Provides a single page from which faculty members may access all their grants, employees, cost codes, and other useful links
School Info	Allows access to the school info page for the assigned school or unit
School Reports	Allows access to school reports (SOM and CAS)
Inbox	
Calendar Edit	Allows access to create and edit calendar entries
Calendar View	Allows access to view calendar entries
Request Lock	Allows access to employ the lock capability on requests. Locking prevents further editing of a request. Unless unlocked, it may only be approved or disapproved

InfoPorte Function	Description
Request Views	Allows access to view Inbox requests for given departments
Settings	
Content Edit	Allows access to edit content panes for pages such as the school info page. Very few users are granted this
Group Edit	Allows access to set up groups containing one or more members and to add or remove members from the group
Route Edit	Allows access to create and configure routes for use in request routing
System Email	Allows access to send system wide emails
User Core Edit	Allows access to set up or change elements within Cores in the given area. This is for managers within the cores system
User Cost Code Edit	Allows access to create or edit cost codes within InfoPorte
User Edit	Allows access to edit user details including user access
User Employee Edit	Allows access to edit relationship access to employees and specified users
User Program Edit	Allows access to edit relationship access to programs and specified users
User Project Edit	Allows access to edit relationship access to projects and specified users
User Switching	Allows access to switch user identities so user may view the InfoPorte environment as a specified user may
Student	
Student Views	Allows access to view term enrollments, term enrollment details, degree candidates, and degree recipients
Reports: Class -- Class Report	Allows access the student class report
Reports: Class -- Class Instructor Report	Allows access to the instructor report
Reports: Class -- Class Meeting Patterns	Allows access to the meeting patterns report
Reports: Class -- Instructor Grading Patterns Report	Allows access to the instructor grading patterns report
Reports: Unused -- Class TBA	Allows access to the student report class TBA

InfoPorte Function	Description
Reports: Unused -- Dean's Dashboard	Allows access to the dean's dashboard - It is rare to give this access
Tools	
Access Request Reporting	Allows access to view data on Access Requests. This is for Access Request Coordinators only
Access Request Tool	Allows access to initiate requests for access within various systems. This is for Access Request Coordinators only
Contract Create	Allows access to create contracts under the Contract tab
Contract Edit	Allows access to edit existing contracts
Contract List	Allows access to view the list of contracts and contract details
Data Dictionary Edit	Allows access to edit the Data Dictionary through the Data Dictionary tab in InfoPorte
Reserve Carolina Inn	Allows access the ability to make reservations of University facilities within the Carolina Inn
Reserve IT Equipment	Allows access to reserve IT equipment
Reserve Parking	Allows access to reserve parking passes
Reserve Room	Allows access to reserve meeting rooms
Resource Edit	Allows access to edit the reservation resources
Source End Date	Allows access to source end date
Termination Date	Allows access to termination date
Visa End Date	Allows access to view visa end date