

### Release 7.1, November 16, 2017

### Summary of the Changes

#### Finance

- You can now export the data on the Grant Detail Report to Excel. (<u>click here for more</u> <u>information</u>)
- The main Transactions Report (found under Finance > Dept Accounting) now displays more quickly if you need to display a large amount of data. (click here for more information)

#### **HR/Payroll**

• The Positions Report has new filters that make it easier to use. (click here for more details)

#### **Student Administration**

• All of the Student reports now let you search by a range of term codes. (<u>click here for more details</u>)

#### Cores

- The Cores Report Dashboard is a new report available under the Manage Cores tab. This report lets you filter in different ways, displays Cores data trends and lets you drill down into details about the Cores. (click here for more details)
- You can now change the images for Cores by going to the Manage Cores tab. (<u>click here for</u> <u>more details</u>)
- The process of granting access to edit Cores now matches the rest of InfoPorte in that users receive access the next business day.

#### **InfoPorte Access**

• Starting with this release, InfoPorte Administrators can now only grant access based on their level of access. In other words, an InfoPorte Administrator cannot grant a higher level of access to a user than they have themselves.

#### 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.



# **DETAILS ABOUT THE CHANGES: FINANCE**

### **Grant Detail**

The Grant Detail Report is a comprehensive "one stop shop" for individual projects. You can now export the report to Excel.

Dept Account	ing Fina	ncial Repor	ting	OSR Financial Rep	orting	inancial	Request	Budget Pr	1	
Ledger Rollups	Ledger Rollups         Transactions         GL Activity         Grants         Soft Encumbrances         Program/Cost Code         IPT Cost Code         UNCFP									
Project Details	rant Details								Return to List	

## **Changes to the Transactions Tab to Make It Run More Quickly**

The Transactions Report shows transactions for all revenue and expense accounts and allows you to reconcile them. Many people across campus rely on the Transactions Report and use it nearly every day, but performance has been less than optimal. If you use the report, you have probably noticed that reports that contain a lot of data take a long time to display. The InfoPorte team has made a number of changes to the report that make it display much more quickly. In some cases that may mean an extra click to get all the data you're looking for, but we think you'll agree that the trade-off is worthwhile.

One of the key changes is that the Advanced section of the search has been split into two separate sections: Advanced and Additional Fields. Splitting into two sections allows you to decide whether you want to display the information that makes the report take longer to generate:

- If you decide to use the Additional Fields section, the Transactions Report will take longer to display.
- To see the Reconciled checkbox or the InfoPorte cost codes on your report, you'll need to click the Reconciled button or the IPT Cost Code button to turn them blue. Displaying these makes the report run more slowly, so now you can choose whether you need to see them.
- You'll need to click the check boxes to display salary projections, account totals or comments, or you can click Show All to put a checkmark in all three boxes. Again, showing this information makes the report run more slowly, so now you can choose whether you need to see this information or not.

# **InfoPorte System Updates**

- Advanced					
Cost Code 1		Cost Code 2		Cost Code 3	
Collect Revenue 🔃	Allows % as a trailing wildcard.	Acct Date from	Allows % as a trailing wildcard.	Acct Date to	Allows % as a trailing wildcard.
Trans Type	~	Transaction ID	Allows % as a trailing wildcard	Description	Allows % as a trailing wildcard
Reference 1	Allows % os a trailing wildoord	Reference 2	Allows % as a trailing wildcard.	Employee	
Payment Date From		Payment Date To		Recon Ready 🔃	~
- Additional Fields					
	🛕 Note:	The following addit	tional fields may affect report perfo	ormance.	
Reconciled	Y	IPT Cost Code	Multiple values separated with a comma.	Show Project	ons 🗹 Show Account Totals 🗹
む		行		Show Comme	ents 🗹 Show All 🗹
					行

nnect AROLINA

Once the information you choose to display is returned at the bottom of the Transactions Report screen, you'll see these changes:

- The download file format has been changed from Excel to CSV to improve the formatting of the report and to make the report download more quickly. (Note: You can still open CSV files in Excel.)
- You can no longer sort the information on the report by clicking on the column header. The information will be in chartfield string order.
- The report will show information in batches of 100 rows, and will no longer show the total number of rows. Having the total number of rows was useful, but calculating the total rows before displaying the report significantly slowed down how long it took to generate the report.
- If you decide to check the "Show Account Totals" box in the Additional Fields section, totals will be displayed by page. For example, if a chartfield string has 150 rows, the report will show a total for the first 100 rows on the first page and then a total for the next 50 rows on the second page.

Ledger Rollups Base Search	Transactions	GL Activity Grants	Soft Encumbrar	ices Program/Co	st Code IPT Co	st Code	
Fund Type	STATE	*	Fund	(show all)	*	Program	
Fiscal Year	2017	*	Source			Project	
Budget Prd	2017	•	Account			Bus Unit	UNCCH
Acct Prd	1-July	•	Dept ID	(show all)	h a comma.		Search Clear
> Advanced							
Additional Fields							
ow 100 v entries	Showing 1 to 100	entries					



# **DETAILS ABOUT THE CHANGES: HR/Payroll**

#### **Improvements to the Positions Report**

The Positions Report shows detailed information about both filled and vacant positions. Four new filters give you more options for choosing which positions you want to see on the report:

• A **Vacancy Status** filter lets you choose to show only vacant, filled, or partially-filled positions, or any combination:

Vacancy	(show all)	•
Status	Vacant Filled Partially Filled	

The Vacancy Statuses are defined as:

- Vacant: A position with one or more headcount and none are filled.
- Filled: A position with one or more headcount and all are filled.
- Partially Filled: A position with multiple headcount and some are filled.

*Note:* The report does not take into account future actions. For example, if you have entered a termination action that takes effect next month, the employee will still show up on the report until the action is effective.

- A **Position Type** filter lets you choose to show only regular or only temporary positions.
- A **Type** filter lets you choose which types of positions you'd like to see:



• A **Time-Limited** filter lets you choose whether to show time-limited positions on the report.

The report results now show a new field: the Action Reason. Two other fields, the Status Date and the Rate Percent, have been removed since they're no longer relevant.



# DETAILS ABOUT THE CHANGES: STUDENT ADMINISTRATION

#### **Term Code Range Search on Student Administration Reports**

The Term Enrollment Report, Degree Candidates Report, and Degree Recipients Report now allow you to search by a range of term codes:

```
        Term Code From
        2017 Summer II (2174)
        Term Code To
        2017 Summer II (2174)
```

# **DETAILS ABOUT THE CHANGES: CORES**

#### **New Cores Dashboard**

Cores provides a valuable service to both campus and external agencies, and new dashboards provide aggregated information about Cores transactions to make it easier to track the value of the service.

The Cores Report Dashboard is a new report available under the Manage Cores tab. This report allows you to filter information in various ways, displays Cores data trends and lets you drill down into details about the Cores.





## **Changing Images for Cores**

You can now go to the Manage Cores tab to change the images for a Core, giving a customized look. Unless you change it, the default image will remain the UNC old well:



## **Granting Access to Edit Cores**

The process of granting access to edit Cores on the InfoPorte access screen has been updated to use the current InfoPorte security model so that users receive access the next business day.

Function	Core Edit	
	Cores Consolidated Sales Core Edit Cores Import Cores PI Chartfields FRS Feed Views	

## **Viewing Cores Order Receipt and Payment Information**

In order to address customer security and privacy concerns, the process for viewing receipt and payment information has changed with the InfoPorte Release 7.1. We will no longer provide unique, short URLs that take customers directly to their receipt or credit card payment page. The short URLs were easily edited and allowed customers to unintentionally or intentionally view information other than their own.

#### Find Order or Request Page

In place of short URLs, all customers will be provided with a **Find Order or Request** page link. Customers will:

- Provide **Order or Request number** and an **email address** associated with the order or request.
- **Enter Orders** with a dash (e.g. 43-88901) or just the last digits after the dash (e.g. 88901). If the dash is omitted, the order will not be found.

Currently, there are still emails in customer's inboxes with short URLs. Customers who click on a short URL will be redirected to the Find Order or Request page.

# **InfoPorte System Updates**



As an additional security measure, the Find Order or Request page limits the number of attempts to look up an order to five. If an order is found then the counter is reset. A "Too Many Attempts" message will display after five attempts.

Too many attempts.				40
		Home	Tools	Cores
Home Find Order	or Request			
Order or Request Number	12300 Enter Core Order Number or Infoporte Request Number			
Email associated with Order or Request	fred.flintstone@gmail.com			
	Clear Find Order or Request This page limits your number of attempts.			
	Online Help Request   Feedback Infoporte   Version: 7.1   © 2017 The University of North Carolina at Chapel Hill			

- If a Core order is found for the Order and email address entered, the Receipt/Invoice for the order will display.
- If the order is a Complete Credit Card order then a link to "Pay for this Order" will be at the bottom of the receipt.

bob poliachik@gmail.com			bob.poliachik@gmail.com				
Services Ordered							
Item							
Cone Gear Mixer							
Name	Qty/Hrs	Price Per	Instructions	Details		Pric	
Mixer Set A. Coqueal 57-9	4	\$124.99		Mixer Set A, Coqueal 57-9 [Channels: 8]		\$124.9	
0 Phase Zexg	12	\$0. <mark>1</mark> 4		0 Phase Zexg [Comments: asl:kdj]		\$1.6	
					item subtotal	\$126.6	
					Subtotal	\$126	
					Shipping & Handling	54	
					Total	\$131.	
Agreement Accepted							
					Pay for This Order		
				email a link to this receipt to:			
				send credit card payment email to:			

• Clicking "Pay for This Order" opens the Touchnet payment page.

# InfoPorte System Updates



Core 100 Core 100 test core		Return to Lis
Please verify your billing information.		
	Date Ordered: 06/07/2016	View Invoice
Billing Name	Fester Bestertester	
Billing Email	bob.poliachik@gmail.com	
Billing Address	21 East Westchester Ave	
Billing Address2	011	
City	Apex	
State	NO	
Zip	27502	
Country	United States	
Total	131.62	
		Click Here to proceed
	Online Help Request   Fee	dback
* Bob – Develop * (	DEV data)   Version: 7.1   © 2017 The Unive	rrsity of North Carolina at Chapel Hill