InfoPorte System Updates

Release 7.1, November 16, 2017

Summary of the Changes

Finance

- You can now export the data on the Grant Detail Report to Excel. (click here for more information)
- 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. (click here for more details)

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. (click here for more details)
- 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.

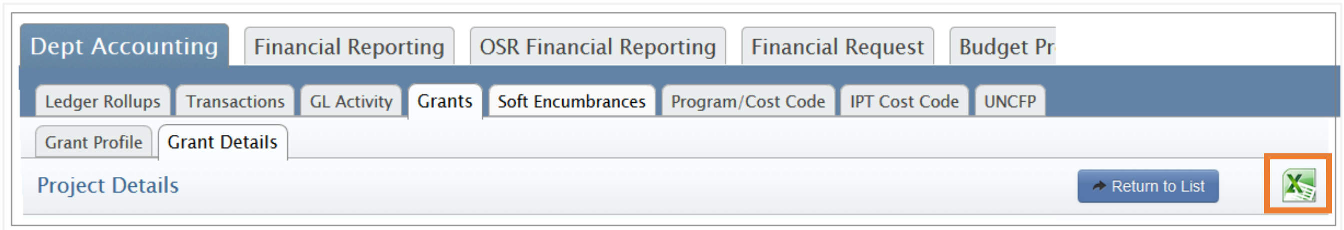
Need help with InfoPorte? Resources are available:

- **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.



Changes to the Transactions Tab to Make It Run More Quickly

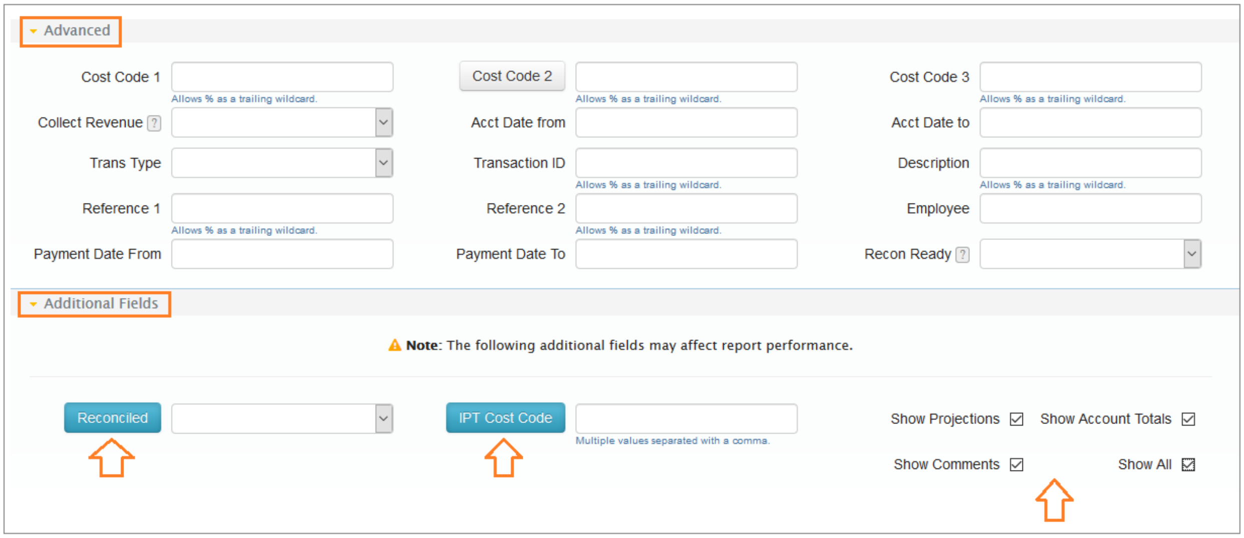
The Transactions Report shows transactions for all revenue and expense accounts and allows you to reconcile them. Many people across campus rely on the Transactions Report and use it nearly every day, but performance has been less than optimal. If you use the report, you have probably noticed that reports 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.

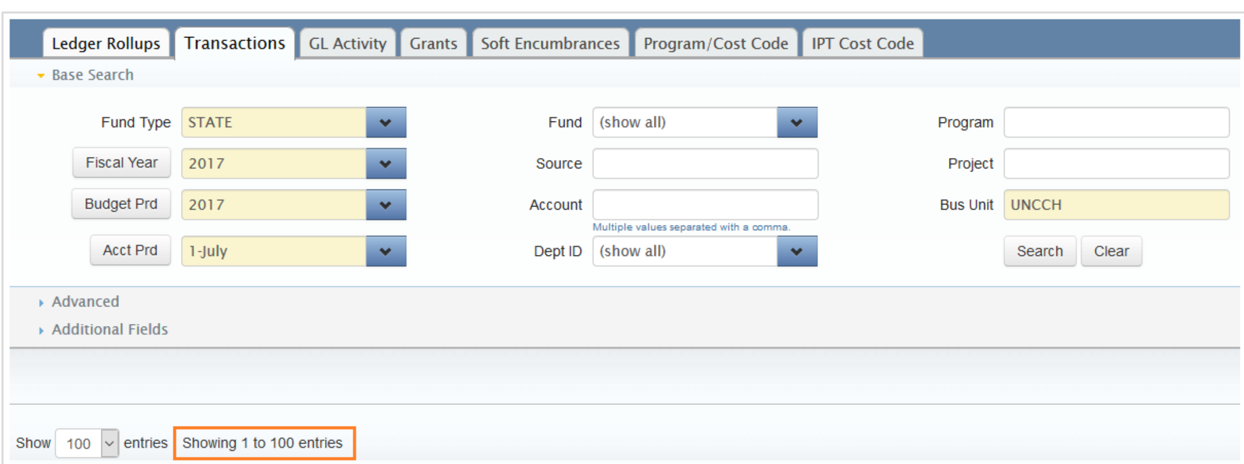
- To see the Reconciled checkbox or the InfoPorte cost codes on your report, you'll need to click the Reconciled button or the IPT Cost Code button to turn them blue. Displaying these makes the report run more slowly, so now you can choose whether you need to see them.

- 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.



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.

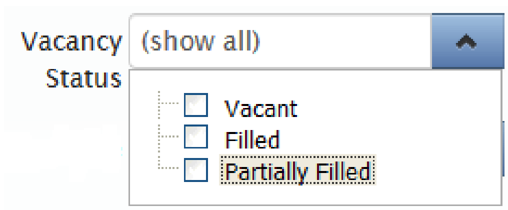


DETAILS ABOUT THE CHANGES: HR/Payroll

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:

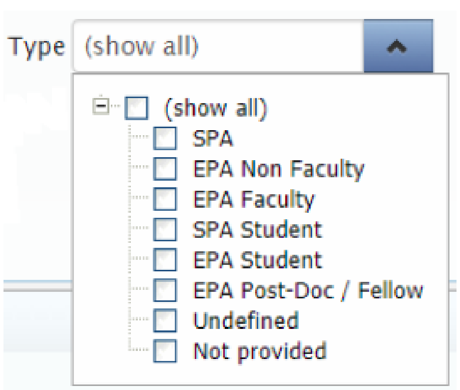
  

  The Vacancy Statuses are defined as:
  - Vacant: A position with one or more headcount and none are filled.
  - Filled: A position with one or more headcount and all are filled.
  - Partially Filled: A position with multiple headcount and some are filled.

  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

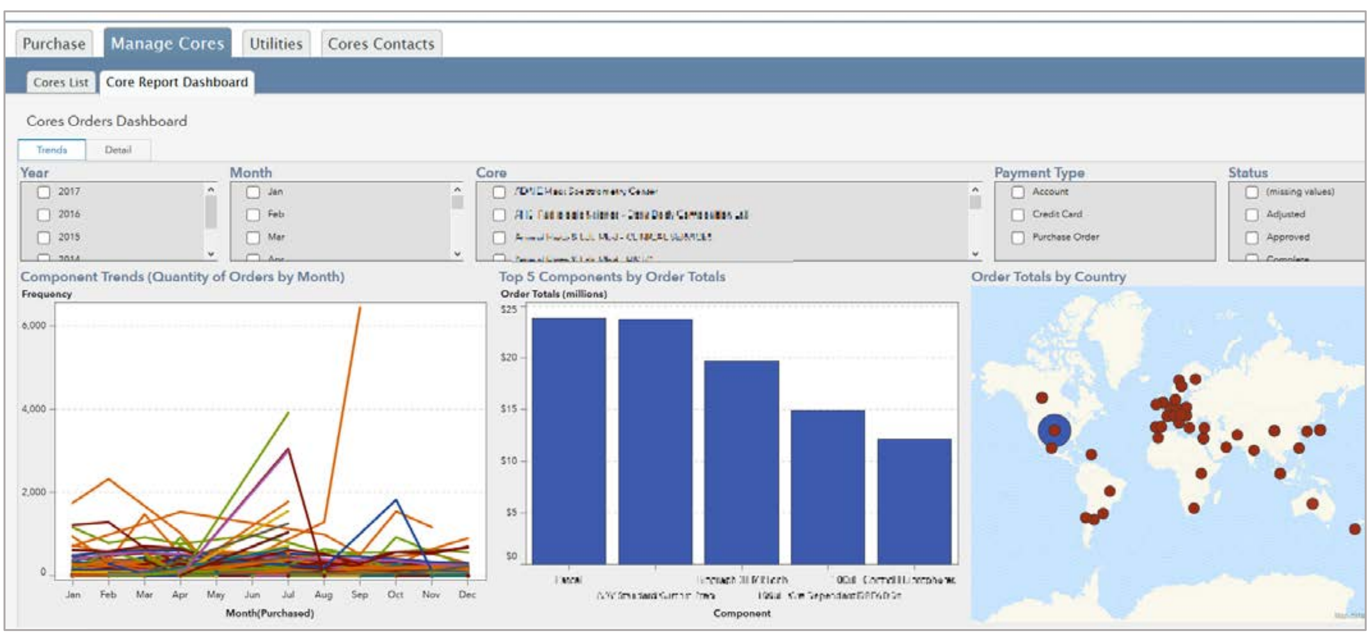
The Term Enrollment Report, Degree Candidates Report, and Degree Recipients Report now allow you to search by a range of term codes:

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.

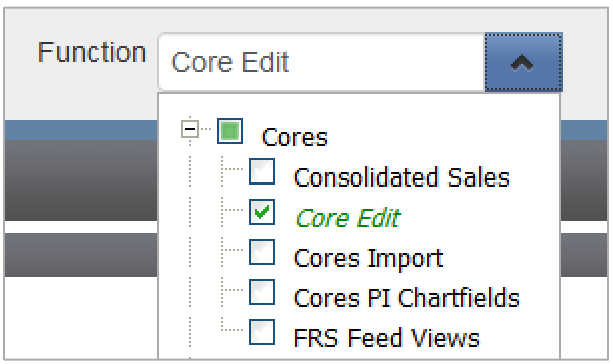


Changing Images for Cores

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.



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.

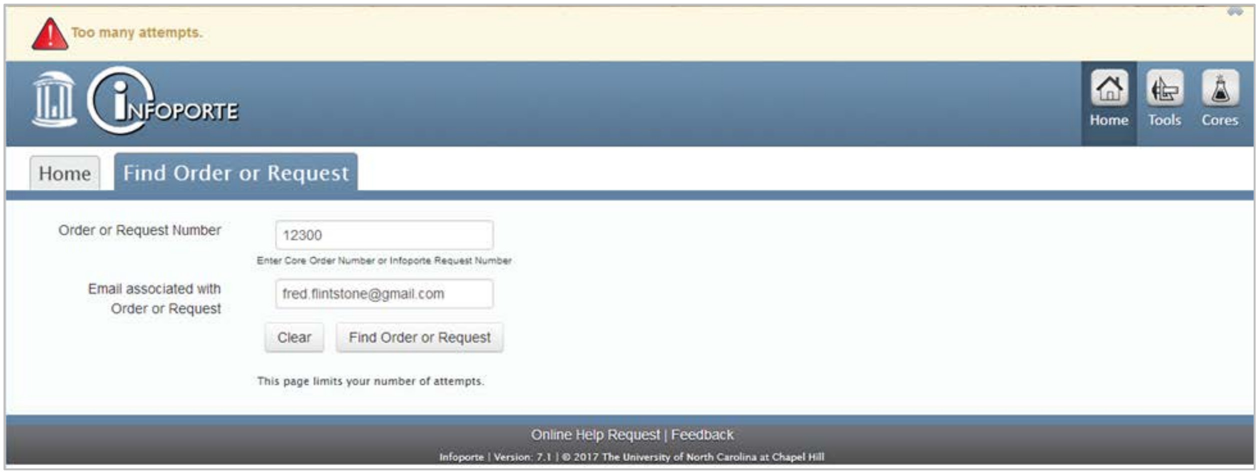
Find Order or Request Page

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

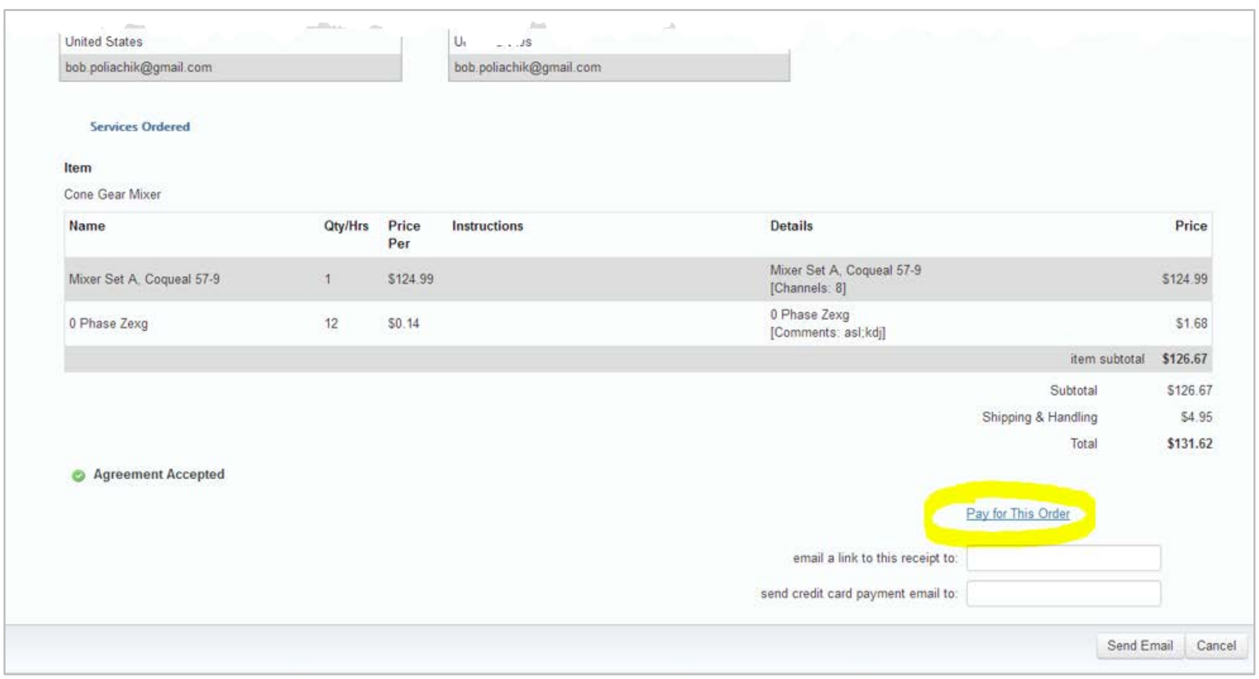
- Provide **Order or Request number** and an **email address** associated with the order or request.
- **Enter Orders** with a dash (e.g. 43-88901) or just the last digits after the dash (e.g. 88901). If the dash is omitted, the order will not be found.

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.

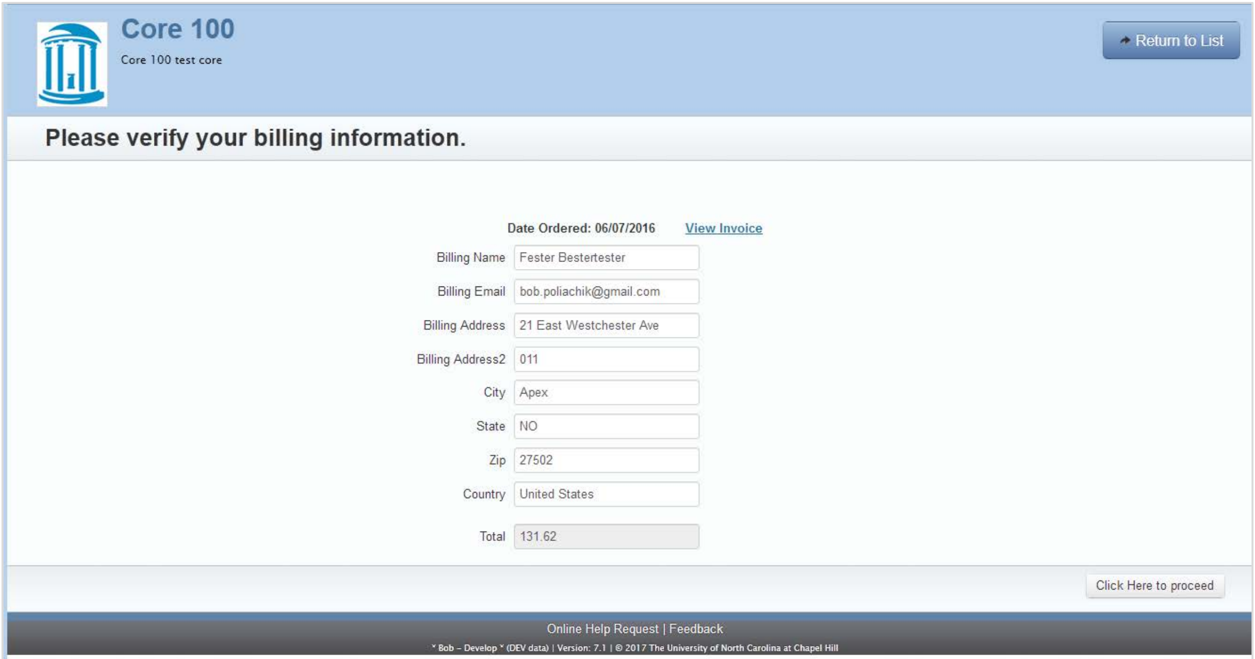
As an additional security measure, the Find Order or Request page limits the number of attempts to look up an order to five. If an order is found then the counter is reset. A “Too Many Attempts” message will display after five attempts.



- 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.



- Clicking “Pay for This Order” opens the Touchnet payment page.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Return to List
Please verify your billing information.
Date Ordered: 06/07/2016
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* Bob – Develop * (DEV data) | Version: 7.1 | © 2017 The University of North Carolina at Chapel Hill