ConnectCarolina
2018 User Conference

Infoporte R & R: Recharge and Other Reports

Presenters: Dan Kelo and Bob Poliachik

Welcome

Agenda:

- Student Reporting
- HR Reporting
- Faculty Reporting
- Other Misc. Non-Reporting Functionality
- Recharge (Cores)

Non-Financial Reporting in Infoporte

Dan Kelo

ERDS Applications Specialist

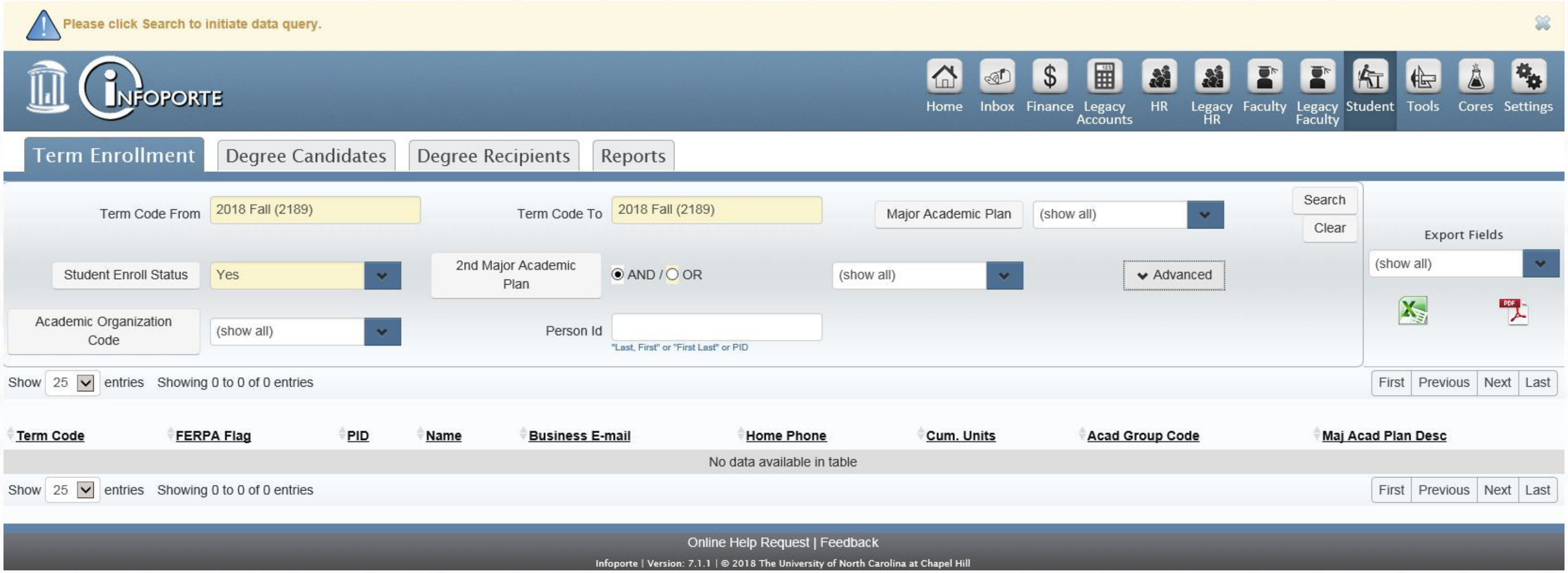
What is Infoporte?

- Secure reporting system providing a view into our enterprise data warehouse
- You see what you are authorized to see
- Allows list reporting, detail drill-down, and Excel/PDF export
- Our presentation will focus on the non-financial portions of Infoporte

Student Reporting

Student – Term Enrollment Filters

Term Enrollment List – Base Filters


Please click Search to initiate data query.
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Legacy HR
Faculty
Legacy Faculty
Student
Tools
Cores
Settings
Term Enrollment
Degree Candidates
Degree Recipients
Reports
Search
Clear
Advanced
Export Fields
First
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Last
Online Help Request | Feedback

Term Code From: 2018 Fall (2189)

Term Code To: 2018 Fall (2189)

Major Academic Plan: (show all)

Student Enroll Status: Yes

2nd Major Academic Plan: ● AND / ○ OR (show all)

Academic Organization Code: (show all)

Person Id: "Last, First" or "First Last" or PID

Export Fields: (show all)

Show 25 entries Showing 0 to 0 of 0 entries

Term Code	FERPA Flag	PID	Name	Business E-mail	Home Phone	Cum. Units	Acad Group Code	Maj Acad Plan Desc
No data available in table								

Show 25 entries Showing 0 to 0 of 0 entries

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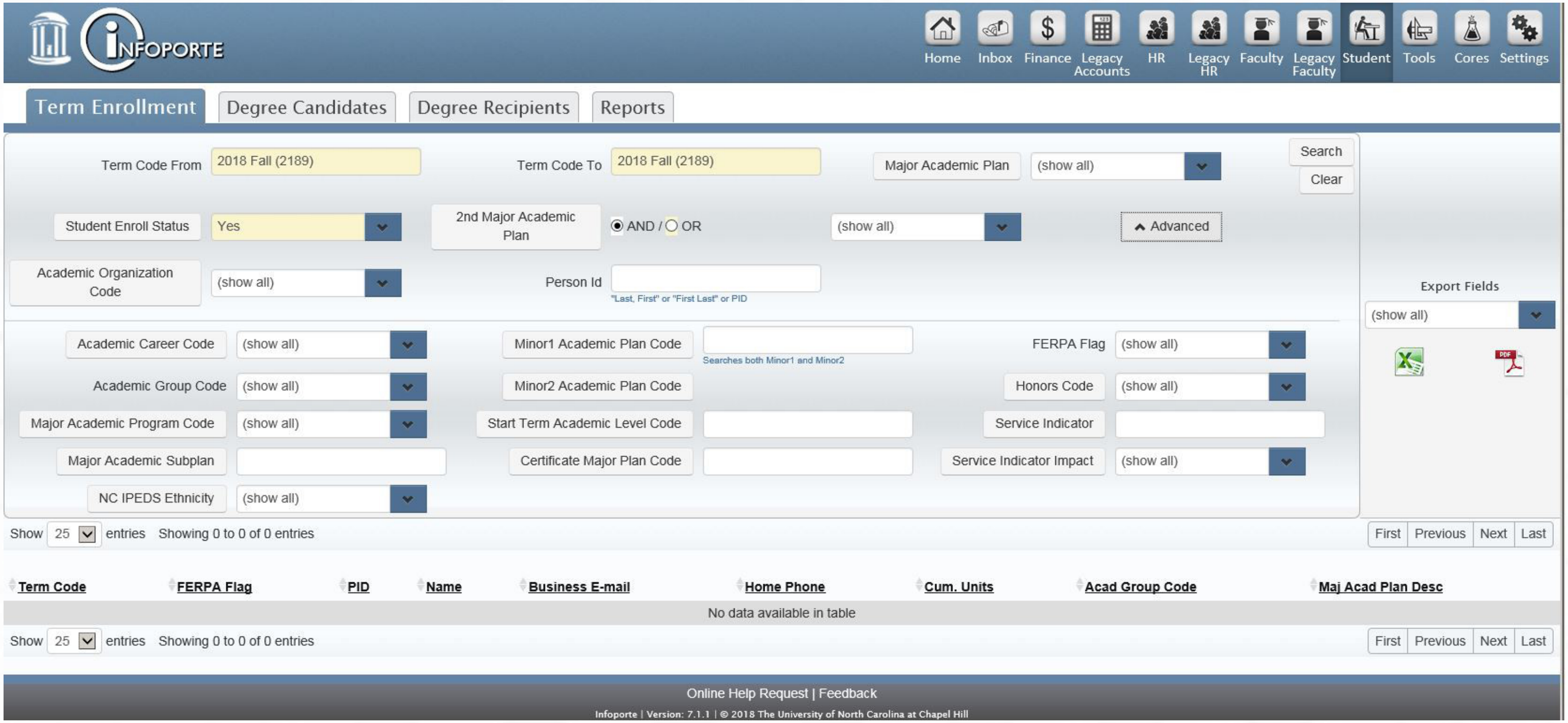
Term Enrollment List – Advanced Filtering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Degree Candidates
Degree Recipients
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Search
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First
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Next
Last

Term Code From: 2018 Fall (2189)

Term Code To: 2018 Fall (2189)

Major Academic Plan: (show all)

Student Enroll Status: Yes

2nd Major Academic Plan: ● AND / ○ OR (show all)

Academic Organization Code: (show all)

Person Id:
"Last, First" or "First Last" or PID

Export Fields: (show all)

Academic Career Code: (show all)

Minor1 Academic Plan Code:
Searches both Minor1 and Minor2

FERPA Flag: (show all)

Academic Group Code: (show all)

Minor2 Academic Plan Code

Honors Code: (show all)

Major Academic Program Code: (show all)

Start Term Academic Level Code:

Service Indicator:

Major Academic Subplan:

Certificate Major Plan Code:

Service Indicator Impact: (show all)

NC IPEDS Ethnicity: (show all)

Show 25 entries Showing 0 to 0 of 0 entries

Term Code	FERPA Flag	PID	Name	Business E-mail	Home Phone	Cum. Units	Acad Group Code	Maj Acad Plan Desc
No data available in table								

Show 25 entries Showing 0 to 0 of 0 entries

Online Help Request | Feedback

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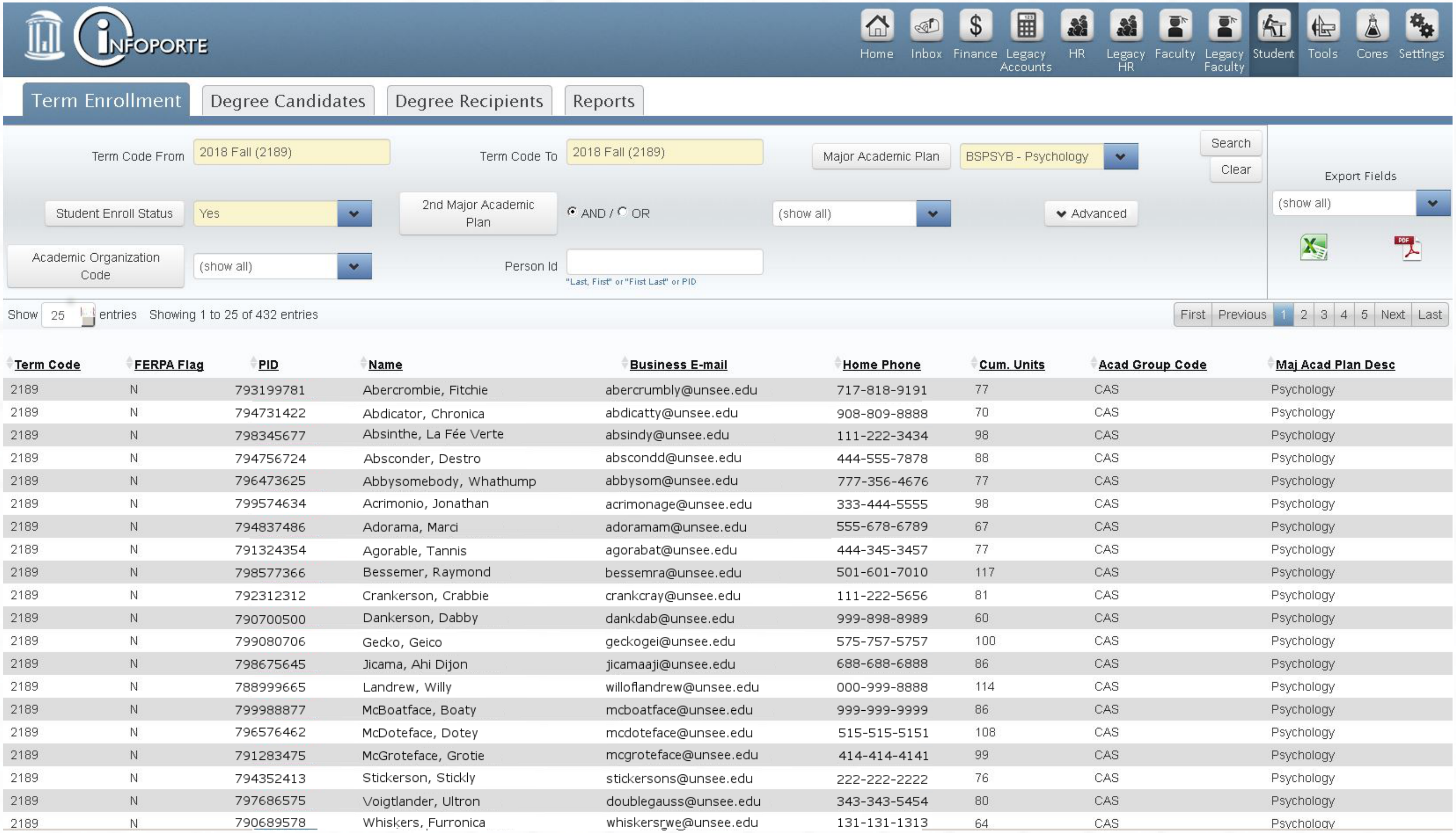
Student – Term Enrollment

Term Enrollment List



Term Code From: 2018 Fall (2189)

Term Code To: 2018 Fall (2189)

Major Academic Plan: BSPSYB - Psychology

Student Enroll Status: Yes

2nd Major Academic Plan: ● AND / ○ OR (show all)

Academic Organization Code: (show all)

Person Id:

"Last, First" or "First Last" or PID

Export Fields: (show all)

Show 25 entries Showing 1 to 25 of 432 entries

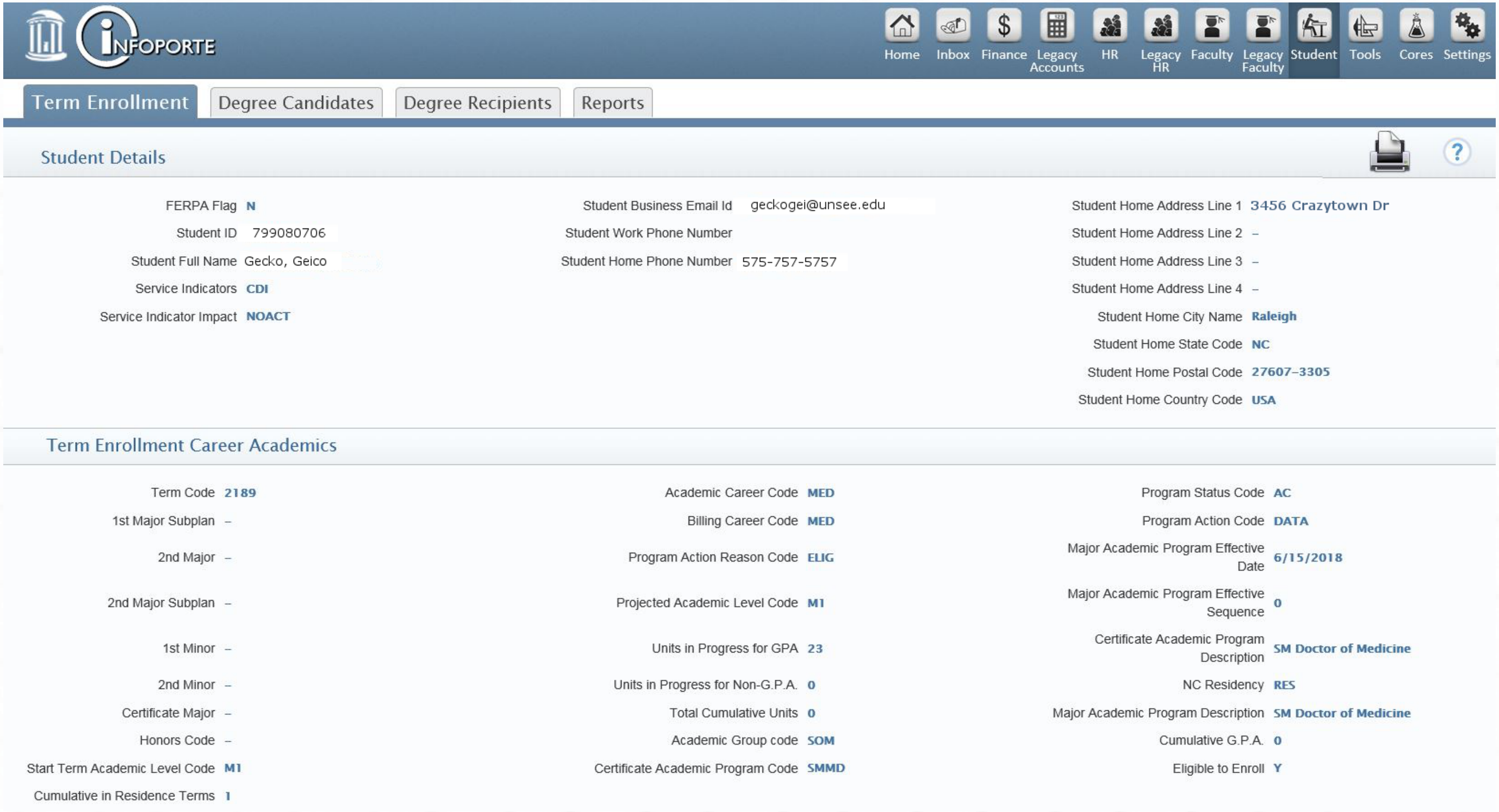
First Previous 1 2 3 4 5 Next Last

Term Code	FERPA Flag	PID	Name	Business E-mail	Home Phone	Cum. Units	Acad Group Code	Maj Acad Plan Desc
2189	N	793199781	Abercrombie, Fitchie	abercrumbly@unsee.edu	717-818-9191	77	CAS	Psychology
2189	N	794731422	Abdicator, Chronica	abdicatty@unsee.edu	908-809-8888	70	CAS	Psychology
2189	N	798345677	Absinthe, La Fée Verte	absindy@unsee.edu	111-222-3434	98	CAS	Psychology
2189	N	794756724	Absconder, Destro	abscondd@unsee.edu	444-555-7878	88	CAS	Psychology
2189	N	796473625	Abbysomebody, Whathump	abbysom@unsee.edu	777-356-4676	77	CAS	Psychology
2189	N	799574634	Acrimonio, Jonathan	acrimonage@unsee.edu	333-444-5555	98	CAS	Psychology
2189	N	794837486	Adorama, Marci	adoramam@unsee.edu	555-678-6789	67	CAS	Psychology
2189	N	791324354	Agorable, Tannis	agorabat@unsee.edu	444-345-3457	77	CAS	Psychology
2189	N	798577366	Bessemer, Raymond	bessemra@unsee.edu	501-601-7010	117	CAS	Psychology
2189	N	792312312	Crankerson, Crabbie	crankcray@unsee.edu	111-222-5656	81	CAS	Psychology
2189	N	790700500	Dankerson, Dabby	dankdab@unsee.edu	999-898-8989	60	CAS	Psychology
2189	N	799080706	Gecko, Geico	geckogei@unsee.edu	575-757-5757	100	CAS	Psychology
2189	N	798675645	Jicama, Ahi Dijon	jicamaaji@unsee.edu	688-688-6888	86	CAS	Psychology
2189	N	788999665	Landrew, Willy	willoflandrew@unsee.edu	000-999-8888	114	CAS	Psychology
2189	N	799988877	McBoatface, Boaty	mcboatface@unsee.edu	999-999-9999	86	CAS	Psychology
2189	N	796576462	McDoteface, Dotey	mcdoteface@unsee.edu	515-515-5151	108	CAS	Psychology
2189	N	791283475	McGroteface, Grotie	mcgroteface@unsee.edu	414-414-4141	99	CAS	Psychology
2189	N	794352413	Stickerson, Stickly	stickersons@unsee.edu	222-222-2222	76	CAS	Psychology
2189	N	797686575	Voigtlander, Ultron	doublegauss@unsee.edu	343-343-5454	80	CAS	Psychology
2189	N	790689578	Whiskers, Furronica	whiskersrwe@unsee.edu	131-131-1313	64	CAS	Psychology

Making the connections

Student – Term Enrollment

Term Enrollment Details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Legacy Faculty
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Term Enrollment
Degree Candidates
Degree Recipients
Reports
?

Student Details

FERPA Flag N
Student ID 799080706
Student Full Name Gecko, Geico
Service Indicators CDI
Service Indicator Impact NOACT

Student Business Email Id geckogei@unsee.edu
Student Work Phone Number
Student Home Phone Number 575-757-5757

Student Home Address Line 1 3456 Crazytown Dr
Student Home Address Line 2 –
Student Home Address Line 3 –
Student Home Address Line 4 –
Student Home City Name Raleigh
Student Home State Code NC
Student Home Postal Code 27607-3305
Student Home Country Code USA

Term Enrollment Career Academics

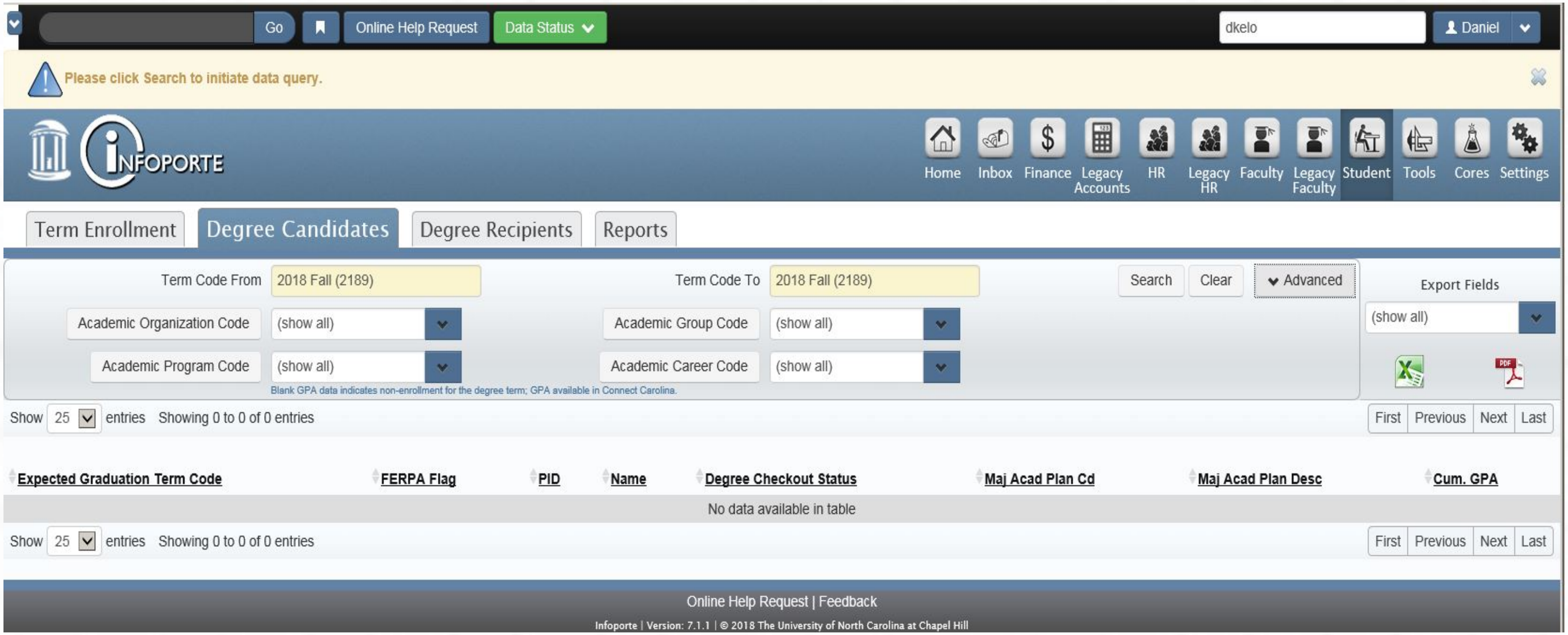
Term Code 2189
1st Major Subplan –
2nd Major –
2nd Major Subplan –
1st Minor –
2nd Minor –
Certificate Major –
Honors Code –
Start Term Academic Level Code M1
Cumulative in Residence Terms 1

Academic Career Code MED
Billing Career Code MED
Program Action Reason Code ELIG
Projected Academic Level Code M1
Units in Progress for GPA 23
Units in Progress for Non-G.P.A. 0
Total Cumulative Units 0
Academic Group code SOM
Certificate Academic Program Code SMMD

Program Status Code AC
Program Action Code DATA
Major Academic Program Effective Date 6/15/2018
Major Academic Program Effective Sequence 0
Certificate Academic Program Description SM Doctor of Medicine
NC Residency RES
Major Academic Program Description SM Doctor of Medicine
Cumulative G.P.A. 0
Eligible to Enroll Y

Student – Degree Candidates

Degree Candidates List – Base Filters


Go
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Please click Search to initiate data query.

Term Code From: 2018 Fall (2189)

Term Code To: 2018 Fall (2189)

Academic Organization Code: (show all)

Academic Group Code: (show all)

Academic Program Code: (show all)

Academic Career Code: (show all)

Export Fields: (show all)

Blank GPA data indicates non-enrollment for the degree term; GPA available in Connect Carolina.

Show 25 entries Showing 0 to 0 of 0 entries

Expected Graduation Term Code	FERPA Flag	PID	Name	Degree Checkout Status	Maj Acad Plan Cd	Maj Acad Plan Desc	Cum. GPA
No data available in table							

Show 25 entries Showing 0 to 0 of 0 entries

Online Help Request | Feedback

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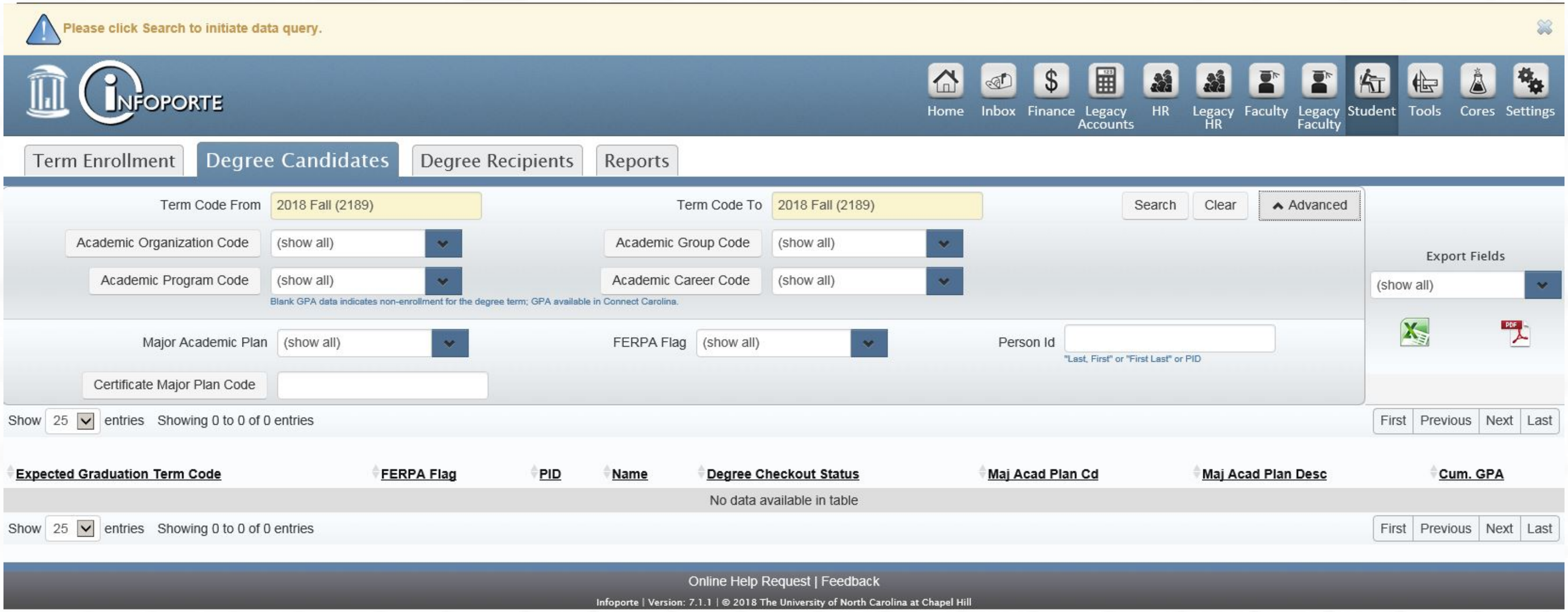
Degree Candidates List – Advanced Filters



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Degree Recipients
Reports
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Export Fields
(show all)

Term Code From: 2018 Fall (2189)
Term Code To: 2018 Fall (2189)
Academic Organization Code: (show all)
Academic Group Code: (show all)
Academic Program Code: (show all)
Academic Career Code: (show all)

Blank GPA data indicates non-enrollment for the degree term; GPA available in Connect Carolina.

Major Academic Plan: (show all)
FERPA Flag: (show all)
Person Id:
"Last, First" or "First Last" or PID
Certificate Major Plan Code:

Show 25 entries Showing 0 to 0 of 0 entries
First
Previous
Next
Last

Expected Graduation Term Code	FERPA Flag	PID	Name	Degree Checkout Status	Maj Acad Plan Cd	Maj Acad Plan Desc	Cum. GPA
No data available in table							

Show 25 entries Showing 0 to 0 of 0 entries
First
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Next
Last

Online Help Request | Feedback

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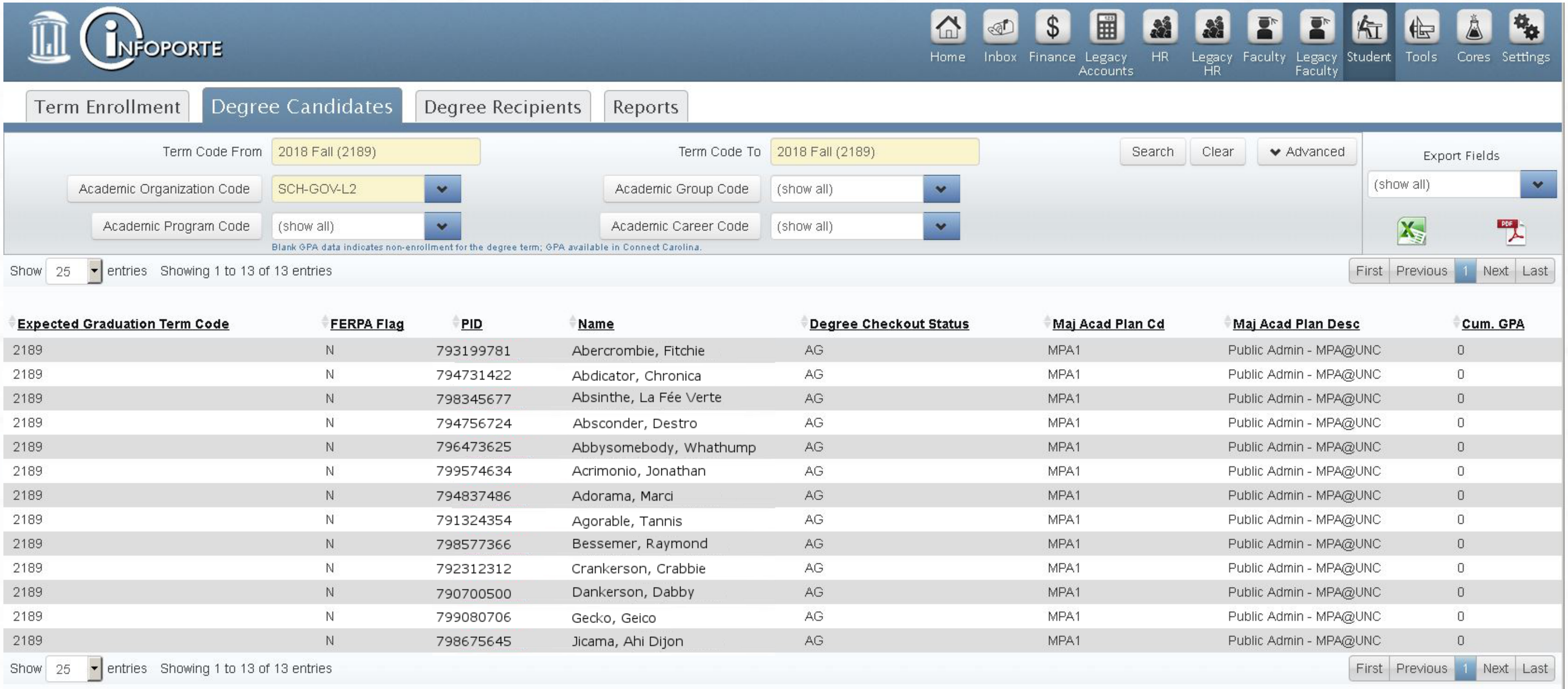
Student – Degree Candidates

Degree Candidates List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Term Enrollment
Degree Candidates
Degree Recipients
Reports
Search
Clear
Advanced
Export Fields

Term Code From: 2018 Fall (2189)

Term Code To: 2018 Fall (2189)

Academic Organization Code: SCH-GOV-L2

Academic Group Code: (show all)

Academic Program Code: (show all)

Academic Career Code: (show all)

Export Fields: (show all)

Blank GPA data indicates non-enrollment for the degree term; GPA available in Connect Carolina.

Show 25 entries Showing 1 to 13 of 13 entries

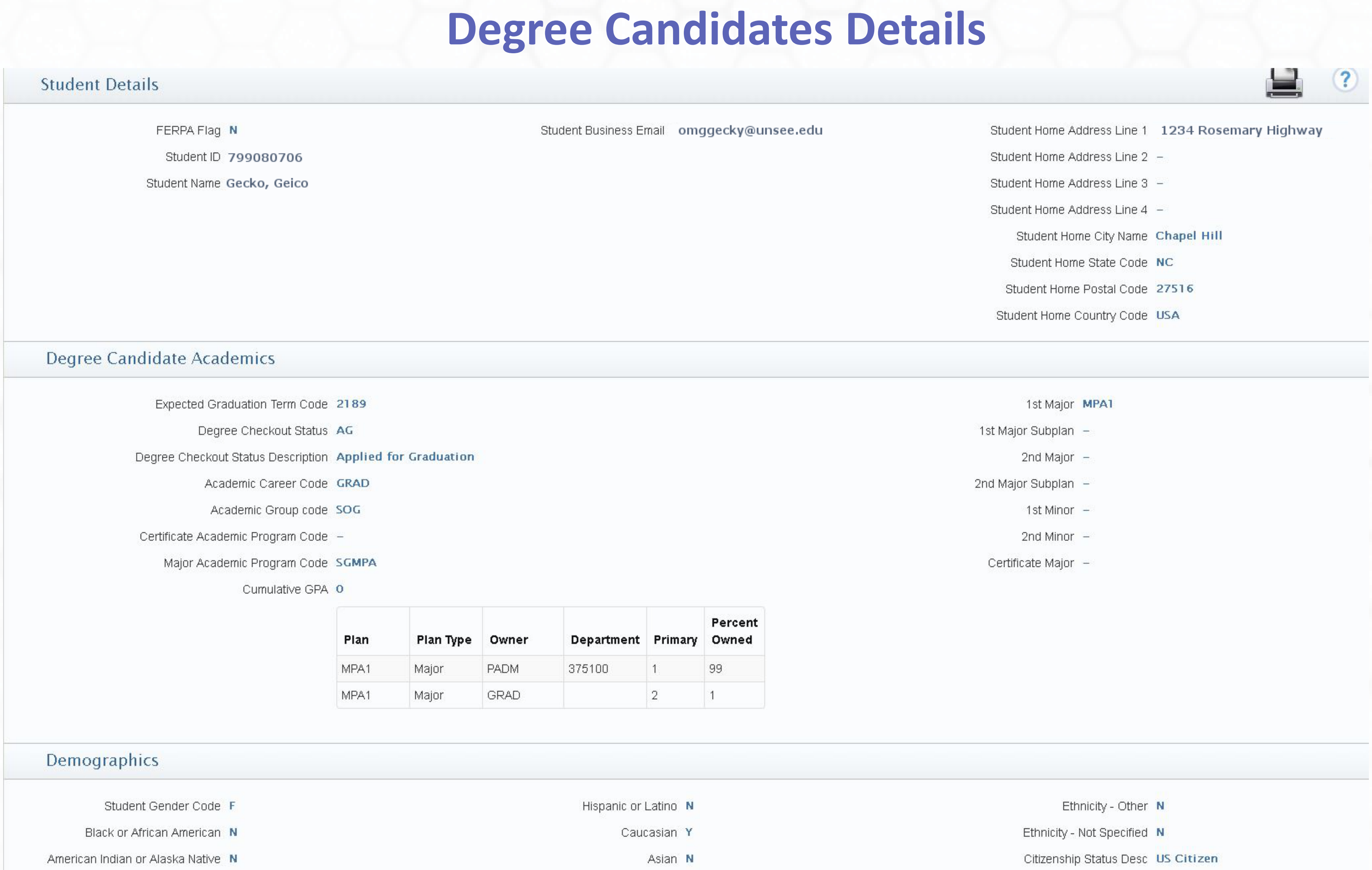
Expected Graduation Term Code	FERPA Flag	PID	Name	Degree Checkout Status	Maj Acad Plan Cd	Maj Acad Plan Desc	Cum. GPA
2189	N	793199781	Abercrombie, Fitchie	AG	MPA1	Public Admin - MPA@UNC	0
2189	N	794731422	Abdicator, Chronica	AG	MPA1	Public Admin - MPA@UNC	0
2189	N	798345677	Absinthe, La Fée Verte	AG	MPA1	Public Admin - MPA@UNC	0
2189	N	794756724	Absconder, Destro	AG	MPA1	Public Admin - MPA@UNC	0
2189	N	796473625	Abbysomebody, Whathump	AG	MPA1	Public Admin - MPA@UNC	0
2189	N	799574634	Acrimonio, Jonathan	AG	MPA1	Public Admin - MPA@UNC	0
2189	N	794837486	Adorama, Marci	AG	MPA1	Public Admin - MPA@UNC	0
2189	N	791324354	Agorable, Tannis	AG	MPA1	Public Admin - MPA@UNC	0
2189	N	798577366	Bessemer, Raymond	AG	MPA1	Public Admin - MPA@UNC	0
2189	N	792312312	Crankerson, Crabbie	AG	MPA1	Public Admin - MPA@UNC	0
2189	N	790700500	Dankerson, Dabby	AG	MPA1	Public Admin - MPA@UNC	0
2189	N	799080706	Gecko, Geico	AG	MPA1	Public Admin - MPA@UNC	0
2189	N	798675645	Jicama, Ahi Dijon	AG	MPA1	Public Admin - MPA@UNC	0

Show 25 entries Showing 1 to 13 of 13 entries

First Previous 1 Next Last

Making the connections

Student – Degree Candidates Details



Degree Candidates Details

Student Details

FERPA Flag **N**
Student ID **799080706**
Student Name **Gecko, Geico**

Student Business Email **omggecky@unsee.edu**

Student Home Address Line 1 **1234 Rosemary Highway**
Student Home Address Line 2 –
Student Home Address Line 3 –
Student Home Address Line 4 –
Student Home City Name **Chapel Hill**
Student Home State Code **NC**
Student Home Postal Code **27516**
Student Home Country Code **USA**

Degree Candidate Academics

Expected Graduation Term Code **2189**
Degree Checkout Status **AG**
Degree Checkout Status Description **Applied for Graduation**
Academic Career Code **GRAD**
Academic Group code **SOG**
Certificate Academic Program Code –
Major Academic Program Code **SGMPA**
Cumulative GPA **0**

1st Major **MPA1**
1st Major Subplan –
2nd Major –
2nd Major Subplan –
1st Minor –
2nd Minor –
Certificate Major –

Plan	Plan Type	Owner	Department	Primary	Percent Owned
MPA1	Major	PADM	375100	1	99
MPA1	Major	GRAD		2	1

Demographics

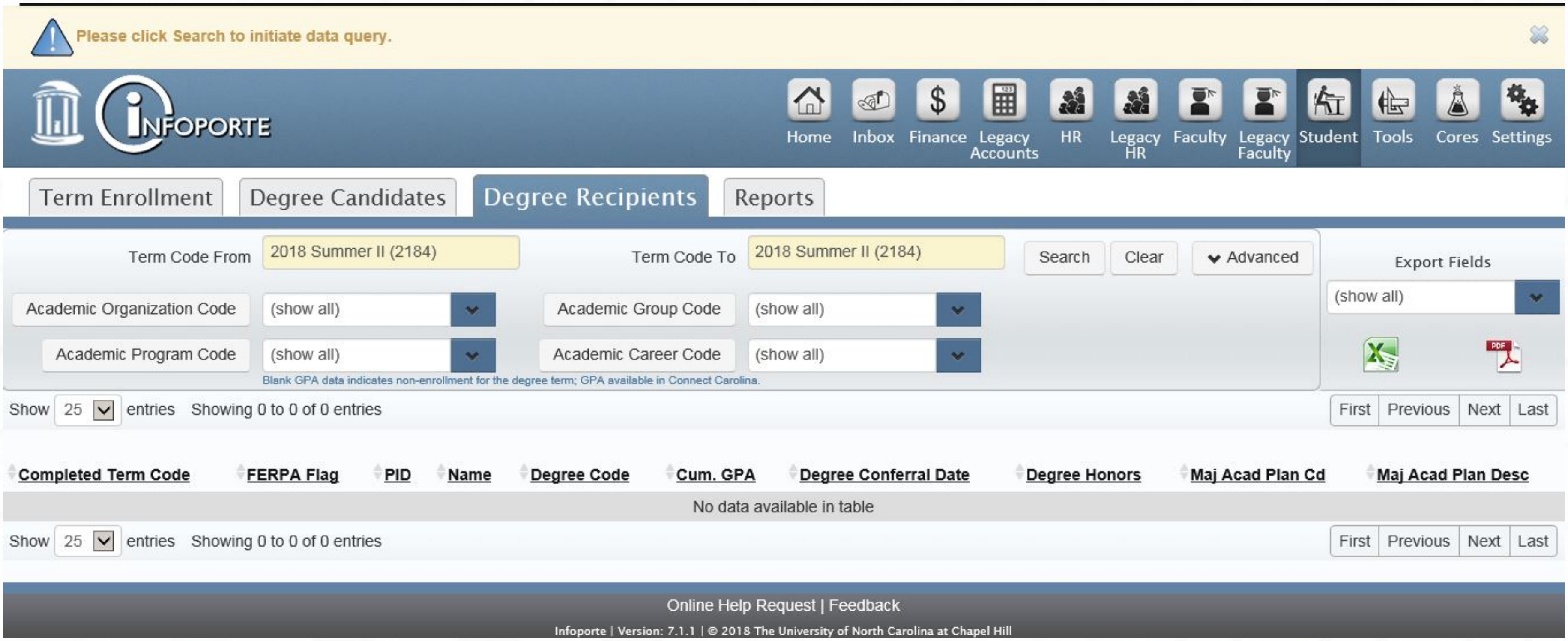
Student Gender Code **F**
Black or African American **N**
American Indian or Alaska Native **N**

Hispanic or Latino **N**
Caucasian **Y**
Asian **N**

Ethnicity - Other **N**
Ethnicity - Not Specified **N**
Citizenship Status Desc **US Citizen**

Student – Degree Recipients

Degree Recipients Base Filters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Term Enrollment
Degree Candidates
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Reports
Search
Clear
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Export Fields
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Please click Search to initiate data query.

Term Code From: 2018 Summer II (2184)
Term Code To: 2018 Summer II (2184)
Academic Organization Code: (show all)
Academic Group Code: (show all)
Academic Program Code: (show all)
Academic Career Code: (show all)
Export Fields: (show all)

Blank GPA data indicates non-enrollment for the degree term; GPA available in Connect Carolina.

Show 25 entries Showing 0 to 0 of 0 entries

Completed Term Code	FERPA Flag	PID	Name	Degree Code	Cum. GPA	Degree Conferral Date	Degree Honors	Maj Acad Plan Cd	Maj Acad Plan Desc
No data available in table									

Show 25 entries Showing 0 to 0 of 0 entries

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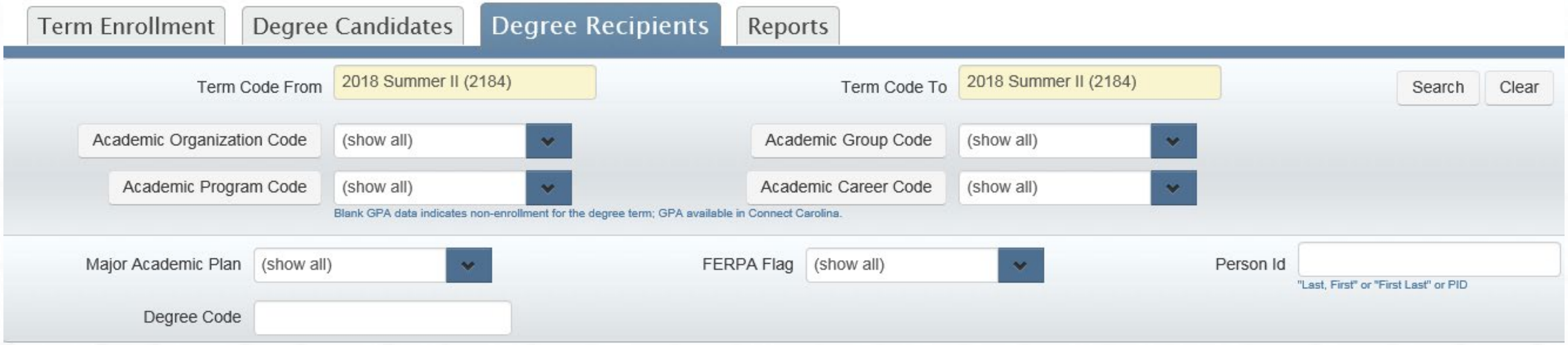
Degree Recipients Enhanced/Advanced Filters


Term Enrollment
Degree Candidates
Degree Recipients
Reports
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Term Code From: 2018 Summer II (2184)

Term Code To: 2018 Summer II (2184)

Academic Organization Code: (show all)

Academic Group Code: (show all)

Academic Program Code: (show all)

Academic Career Code: (show all)

Blank GPA data indicates non-enrollment for the degree term; GPA available in Connect Carolina.

Major Academic Plan: (show all)

FERPA Flag: (show all)

Person Id:

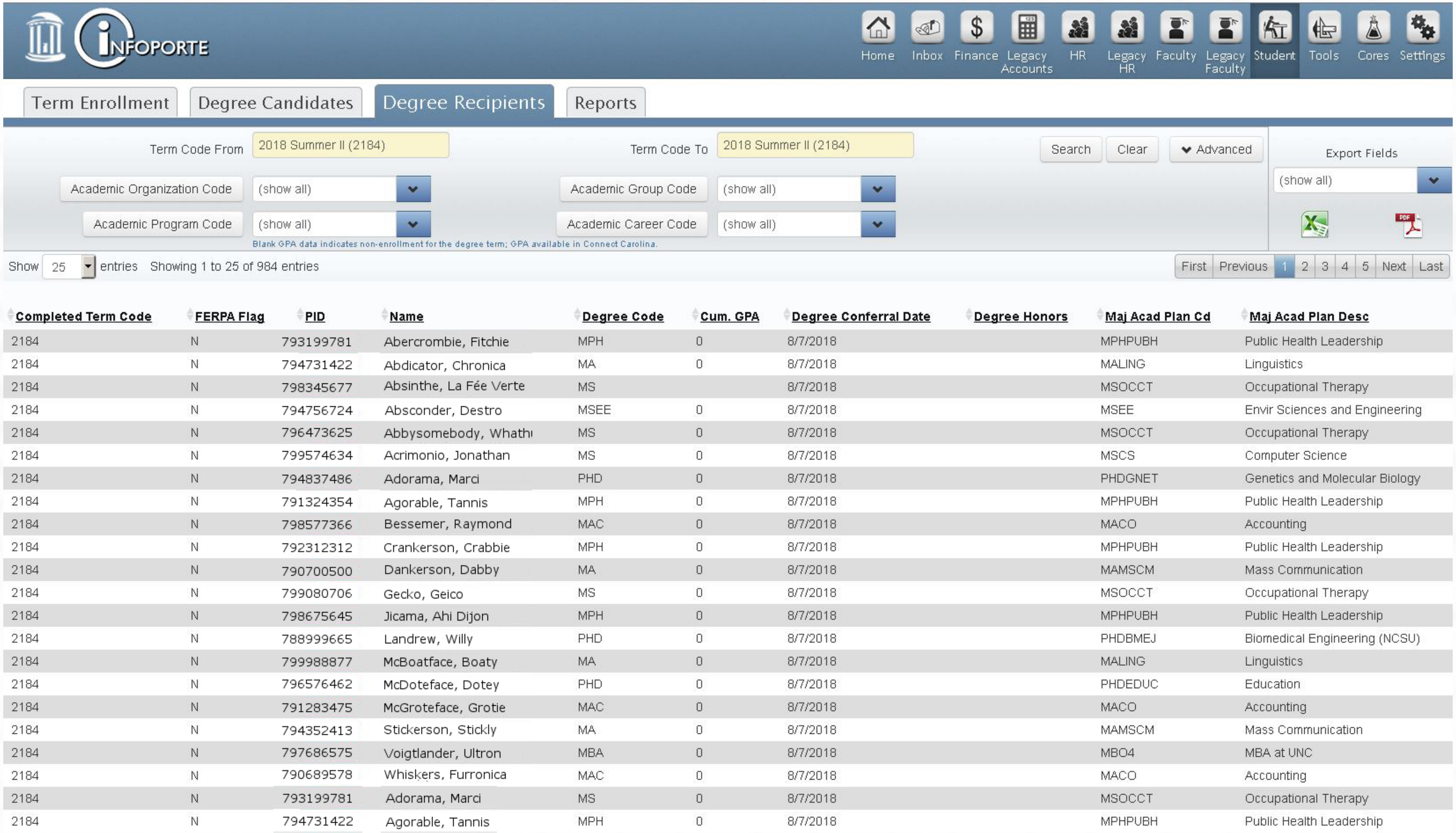
"Last, First" or "First Last" or PID

Degree Code:

Making the connections

Student - Degree Recipients List

Degree Recipients List



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Term Code From: 2018 Summer II (2184)

Term Code To: 2018 Summer II (2184)

Academic Organization Code: (show all)

Academic Group Code: (show all)

Academic Program Code: (show all)

Academic Career Code: (show all)

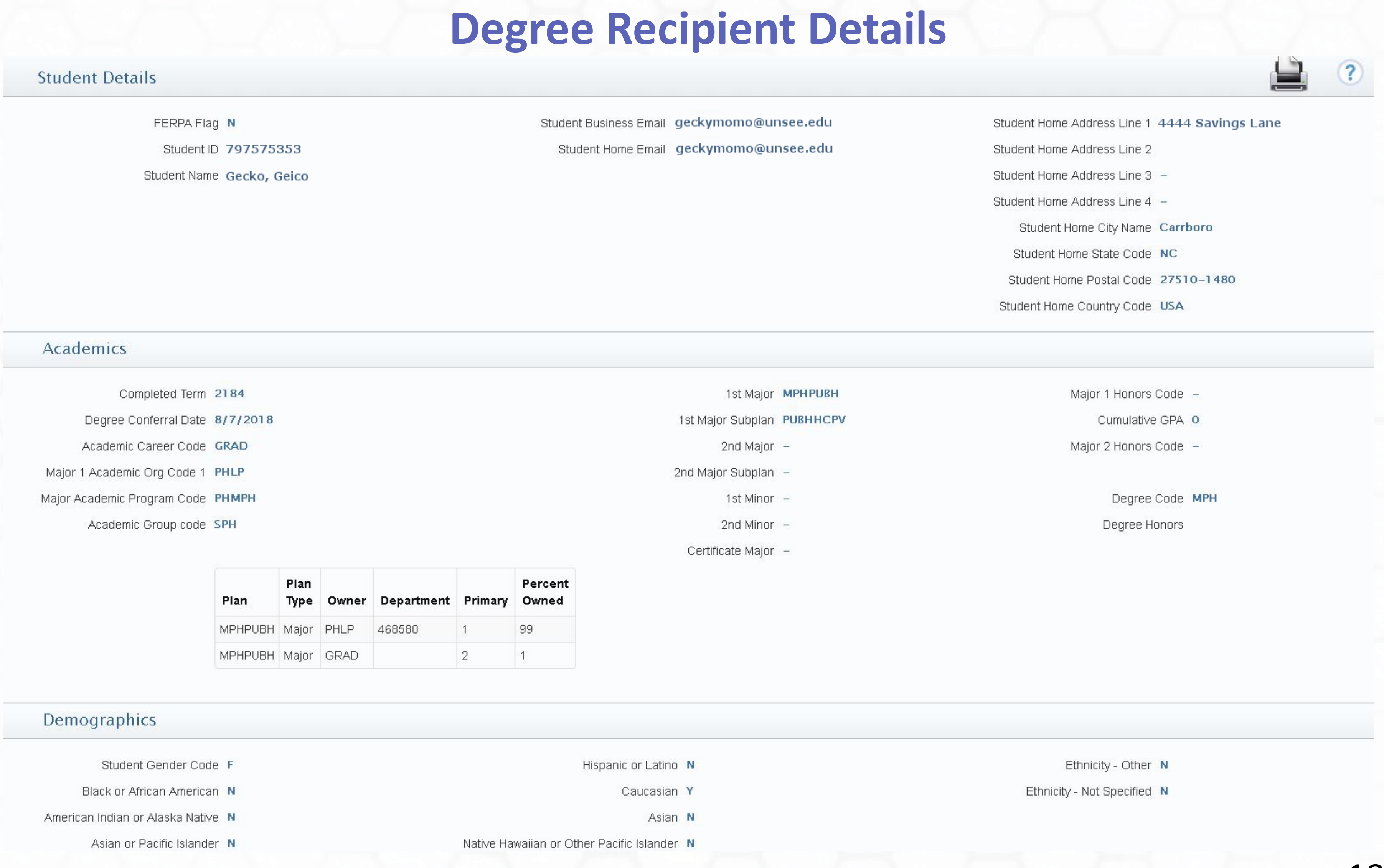
Export Fields: (show all)

Blank GPA data indicates non-enrollment for the degree term; GPA available in Connect Carolina.

Show 25 entries Showing 1 to 25 of 984 entries

Completed Term Code	FERPA Flag	PID	Name	Degree Code	Cum. GPA	Degree Conferral Date	Degree Honors	Maj Acad Plan Cd	Maj Acad Plan Desc
2184	N	793199781	Abercrombie, Fitchie	MPH	0	8/7/2018		MPHPUBH	Public Health Leadership
2184	N	794731422	Abdicator, Chronica	MA	0	8/7/2018		MALING	Linguistics
2184	N	798345677	Absinthe, La Fée Verte	MS		8/7/2018		MSOCCT	Occupational Therapy
2184	N	794756724	Absconder, Destro	MSEE	0	8/7/2018		MSEE	Envir Sciences and Engineering
2184	N	796473625	Abbysomebody, Whath	MS	0	8/7/2018		MSOCCT	Occupational Therapy
2184	N	799574634	Acrimonio, Jonathan	MS	0	8/7/2018		MSCS	Computer Science
2184	N	794837486	Adorama, Marci	PHD	0	8/7/2018		PHDGNET	Genetics and Molecular Biology
2184	N	791324354	Agorable, Tannis	MPH	0	8/7/2018		MPHPUBH	Public Health Leadership
2184	N	798577366	Bessemer, Raymond	MAC	0	8/7/2018		MACO	Accounting
2184	N	792312312	Crankerson, Crabbie	MPH	0	8/7/2018		MPHPUBH	Public Health Leadership
2184	N	790700500	Dankerson, Dabby	MA	0	8/7/2018		MAMSCM	Mass Communication
2184	N	799080706	Gecko, Geico	MS	0	8/7/2018		MSOCCT	Occupational Therapy
2184	N	798675645	Jicama, Ahi Dijon	MPH	0	8/7/2018		MPHPUBH	Public Health Leadership
2184	N	788999665	Landrew, Willy	PHD	0	8/7/2018		PHDBMEJ	Biomedical Engineering (NCSU)
2184	N	799988877	McBoatface, Boaty	MA	0	8/7/2018		MALING	Linguistics
2184	N	796576462	McDoteface, Dotey	PHD	0	8/7/2018		PHDEDUC	Education
2184	N	791283475	McGroteface, Grotie	MAC	0	8/7/2018		MACO	Accounting
2184	N	794352413	Stickerson, Stickly	MA	0	8/7/2018		MAMSCM	Mass Communication
2184	N	797686575	Voigtlander, Ultron	MBA	0	8/7/2018		MBO4	MBA at UNC
2184	N	790689578	Whiskers, Furronica	MAC	0	8/7/2018		MACO	Accounting
2184	N	793199781	Adorama, Marci	MS	0	8/7/2018		MSOCCT	Occupational Therapy
2184	N	794731422	Agorable, Tannis	MPH	0	8/7/2018		MPHPUBH	Public Health Leadership

Student – Degree Recipient Details



Degree Recipient Details

Student Details

FERPA Flag **N**
Student ID **797575353**
Student Name **Gecko, Geico**

Student Business Email **geckymomo@unsee.edu**
Student Home Email **geckymomo@unsee.edu**

Student Home Address Line 1 **4444 Savings Lane**
Student Home Address Line 2
Student Home Address Line 3 **–**
Student Home Address Line 4 **–**
Student Home City Name **Carrboro**
Student Home State Code **NC**
Student Home Postal Code **27510-1480**
Student Home Country Code **USA**

Academics

Completed Term **2184**
Degree Conferral Date **8/7/2018**
Academic Career Code **GRAD**
Major 1 Academic Org Code 1 **PHLP**
Major Academic Program Code **PHMPH**
Academic Group code **SPH**

1st Major **MPHPUBH**
1st Major Subplan **PUBHHCPV**
2nd Major **–**
2nd Major Subplan **–**
1st Minor **–**
2nd Minor **–**
Certificate Major **–**

Major 1 Honors Code **–**
Cumulative GPA **0**
Major 2 Honors Code **–**
Degree Code **MPH**
Degree Honors

Plan	Plan Type	Owner	Department	Primary	Percent Owned
MPHPUBH	Major	PHLP	468580	1	99
MPHPUBH	Major	GRAD		2	1

Demographics

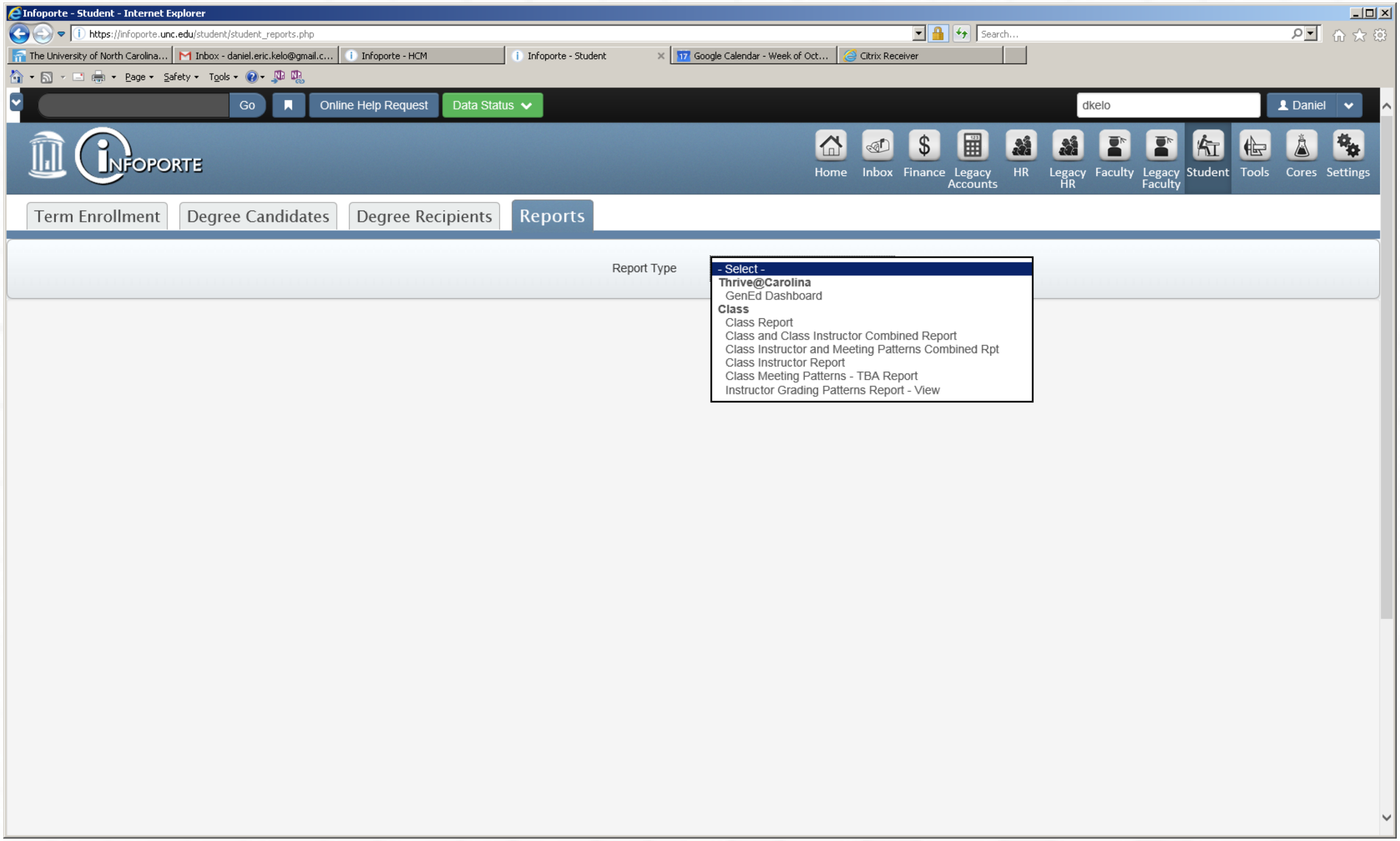
Student Gender Code **F**
Black or African American **N**
American Indian or Alaska Native **N**
Asian or Pacific Islander **N**

Hispanic or Latino **N**
Caucasian **Y**
Asian **N**
Native Hawaiian or Other Pacific Islander **N**

Ethnicity - Other **N**
Ethnicity - Not Specified **N**

Student – Other Student Reports

Other Student Reports (SAS)


Infoporte - Student - Internet Explorer
https://infoporte.unc.edu/student/student_reports.php
The University of North Carolina...
Inbox - daniel.eric.kelo@gmail.c...
Infoporte - HCM
Infoporte - Student
Google Calendar - Week of Oct...
Citrix Receiver
Page
Safety
Tools
Go
Online Help Request
Data Status
dkelo
Daniel
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Home
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Legacy Accounts
HR
Legacy HR
Faculty
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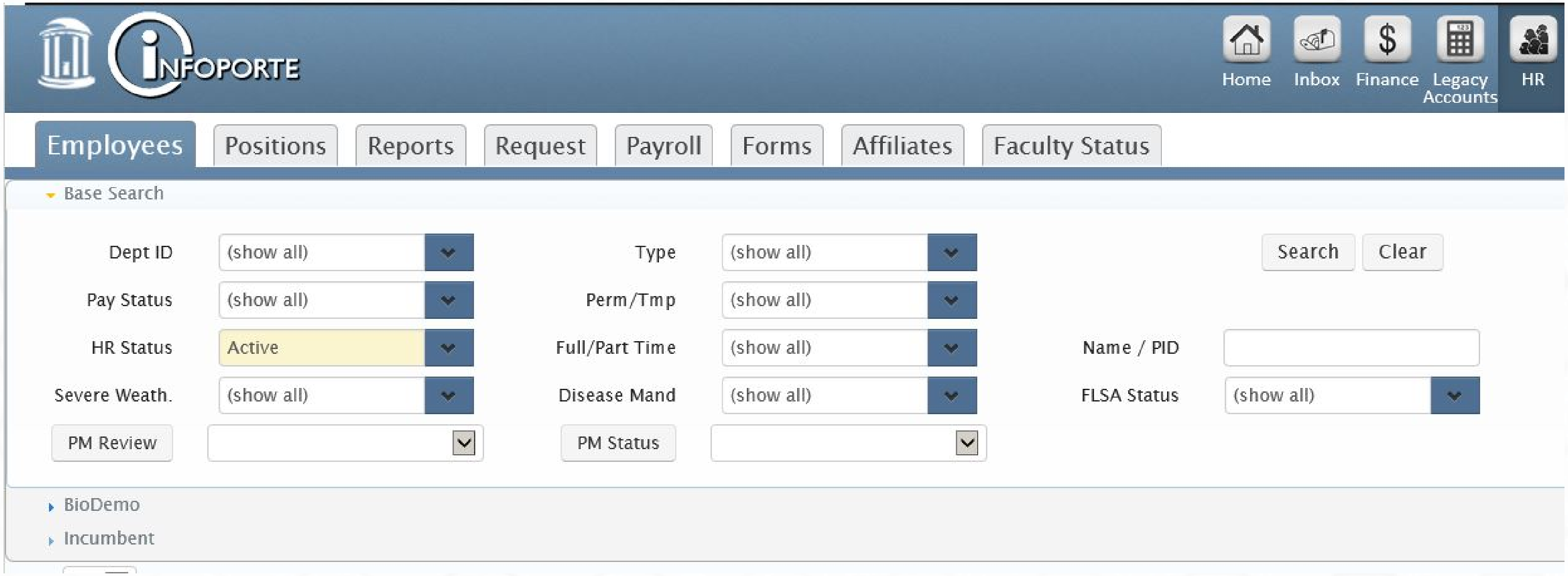
Degree Recipients
Reports

Report Type

- Select -
Thrive@Carolina
  GenEd Dashboard
Class
  Class Report
  Class and Class Instructor Combined Report
  Class Instructor and Meeting Patterns Combined Rpt
  Class Instructor Report
  Class Meeting Patterns - TBA Report
  Instructor Grading Patterns Report - View

HR Reporting

Employees List – Base Filters



INFOPORTE
Home
Inbox
Finance
Legacy Accounts
HR
Employees
Positions
Reports
Request
Payroll
Forms
Affiliates
Faculty Status
Base Search
Search
Clear
PM Review
PM Status
BioDemo
Incumbent

Dept ID: (show all)

Pay Status: (show all)

HR Status: Active

Severe Weath.: (show all)

Type: (show all)

Perm/Tmp: (show all)

Full/Part Time: (show all)

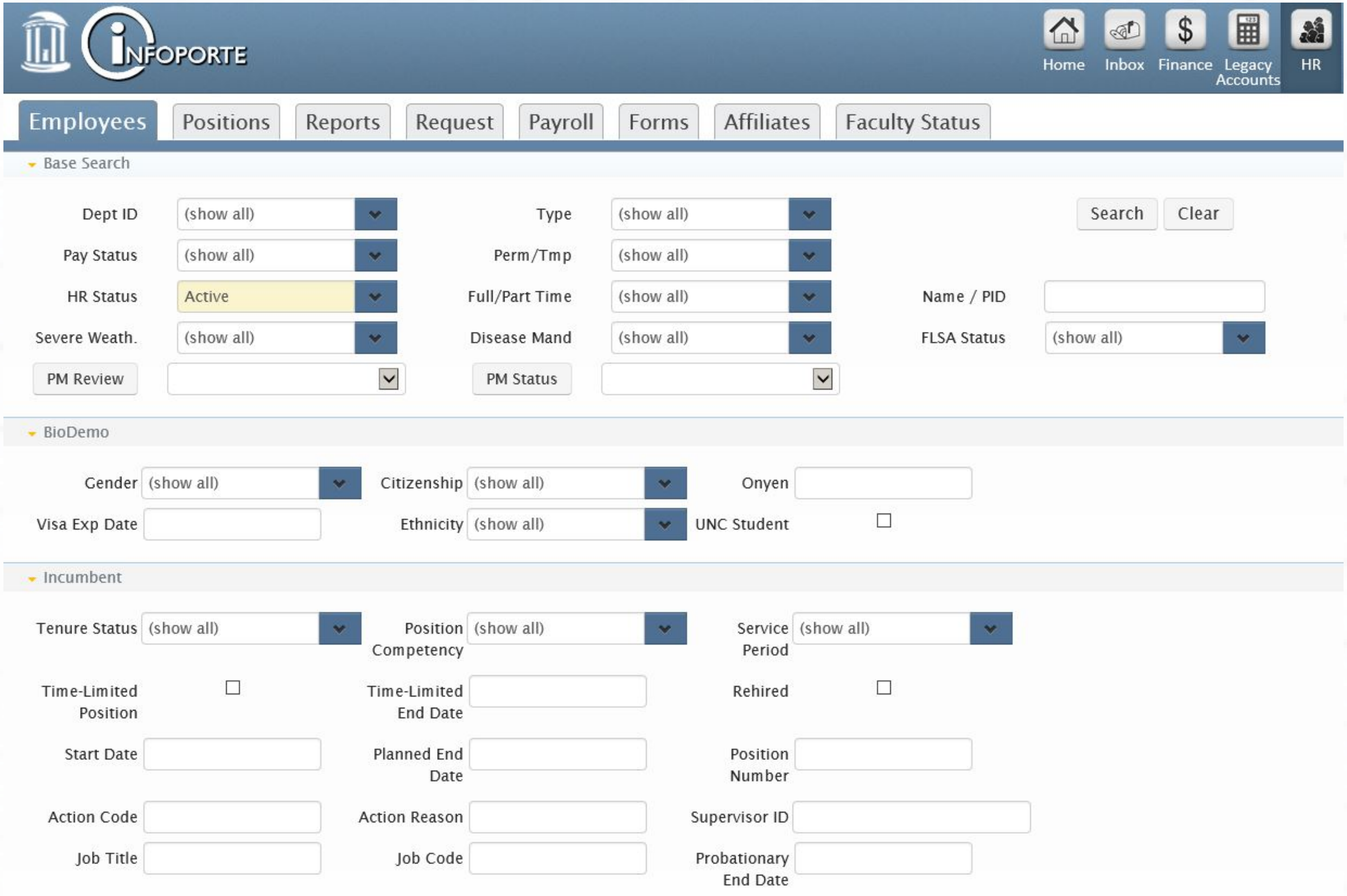
Disease Mand: (show all)

Name / PID:

FLSA Status: (show all)

HR Reporting – Employee List

Employees List – Advanced Filters


INFOPORTE
Home
Inbox
Finance
Legacy Accounts
HR
Employees
Positions
Reports
Request
Payroll
Forms
Affiliates
Faculty Status
Search
Clear
PM Review
PM Status

Base Search

Dept ID	(show all)	Type	(show all)		
Pay Status	(show all)	Perm/Tmp	(show all)		
HR Status	Active	Full/Part Time	(show all)	Name / PID	
Severe Weath.	(show all)	Disease Mand	(show all)	FLSA Status	(show all)
PM Review		PM Status			

BioDemo

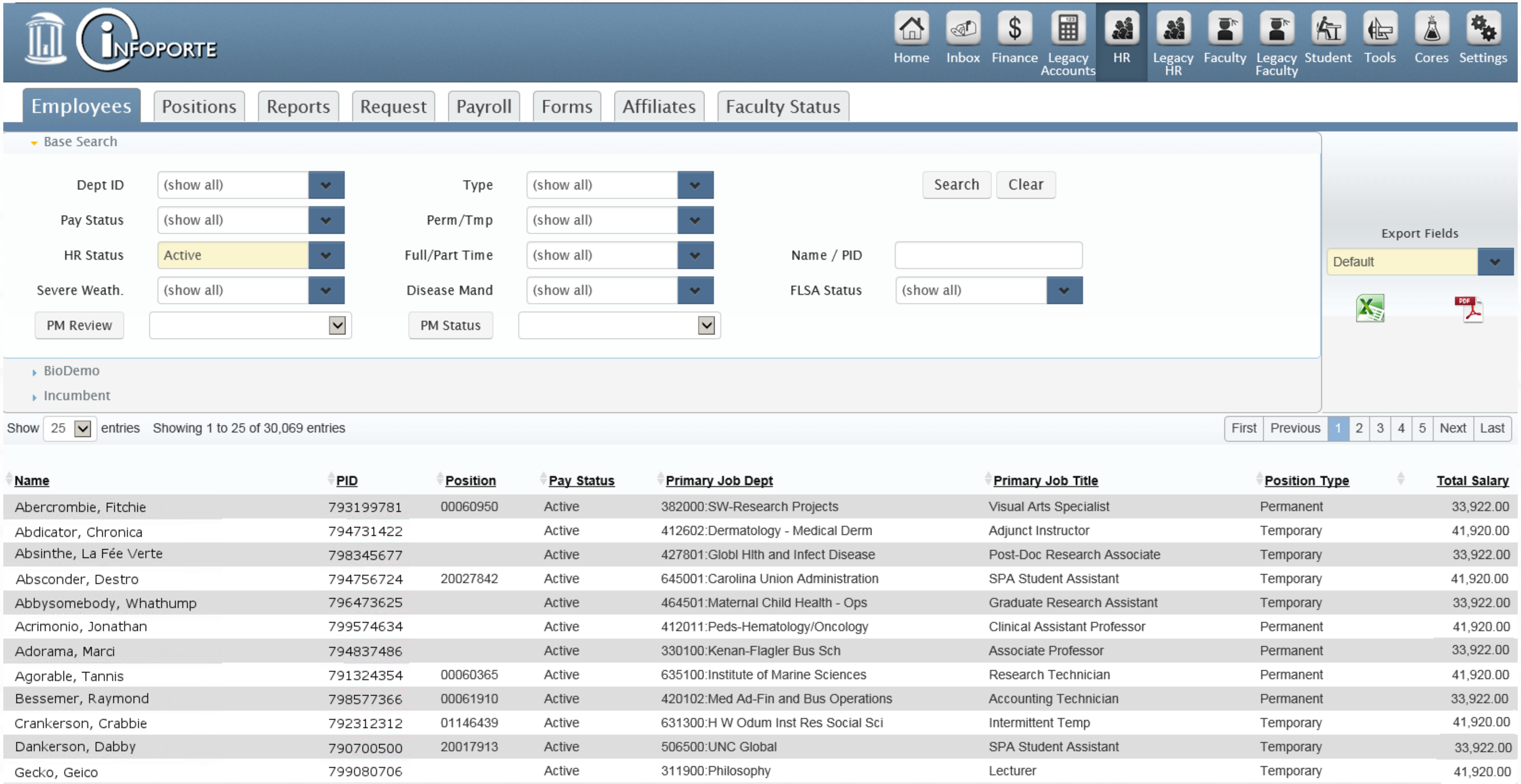
Gender	(show all)	Citizenship	(show all)	Onyen	
Visa Exp Date		Ethnicity	(show all)	UNC Student	☐

Incumbent

Tenure Status	(show all)	Position Competency	(show all)	Service Period	(show all)
Time-Limited Position	☐	Time-Limited End Date		Rehired	☐
Start Date		Planned End Date		Position Number	
Action Code		Action Reason		Supervisor ID	
Job Title		Job Code		Probationary End Date	

HR Reporting – Employee List

Employee List


INFOPORTE
Home
Inbox
Finance
Legacy Accounts
HR
Legacy HR
Faculty
Legacy Faculty
Student
Tools
Cores
Settings
Employees
Positions
Reports
Request
Payroll
Forms
Affiliates
Faculty Status
Base Search
Search
Clear
PM Review
PM Status
Export Fields
BioDemo
Incumbent
First
Previous
1
2
3
4
5
Next
Last

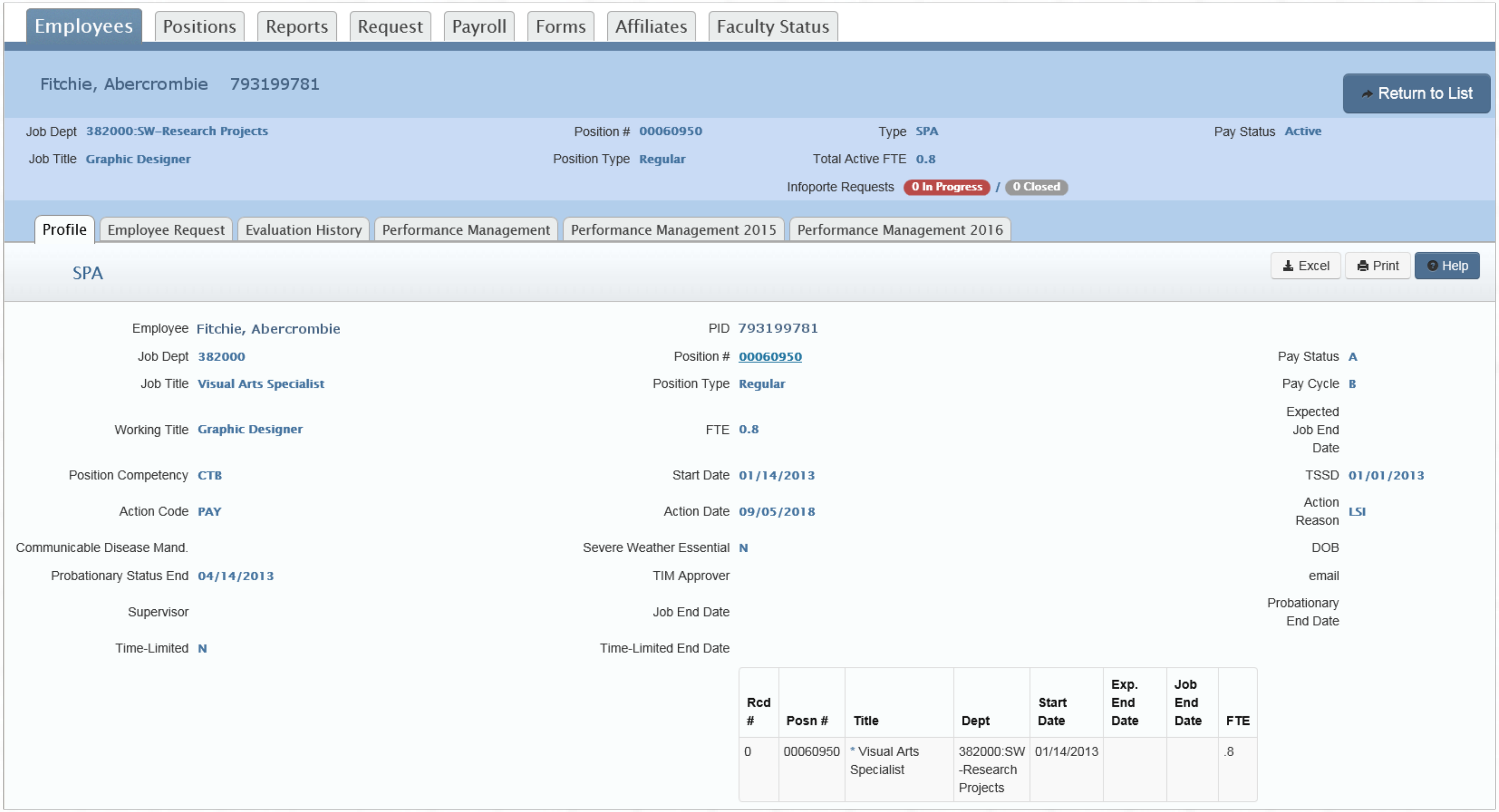
Dept ID: (show all)
Pay Status: (show all)
HR Status: Active
Severe Weath.: (show all)
Type: (show all)
Perm/Tmp: (show all)
Full/Part Time: (show all)
Disease Mand: (show all)
Name / PID:
FLSA Status: (show all)
Export Fields: Default

Show 25 entries Showing 1 to 25 of 30,069 entries

Name	PID	Position	Pay Status	Primary Job Dept	Primary Job Title	Position Type	Total Salary
Abercrombie, Fitchie	793199781	00060950	Active	382000:SW-Research Projects	Visual Arts Specialist	Permanent	33,922.00
Abdicator, Chronica	794731422		Active	412602:Dermatology - Medical Derm	Adjunct Instructor	Temporary	41,920.00
Absinthe, La Fée Verte	798345677		Active	427801:Globl Hlth and Infect Disease	Post-Doc Research Associate	Temporary	33,922.00
Absconder, Destro	794756724	20027842	Active	645001:Carolina Union Administration	SPA Student Assistant	Temporary	41,920.00
Abbysomebody, Whathump	796473625		Active	464501:Maternal Child Health - Ops	Graduate Research Assistant	Temporary	33,922.00
Acrimonio, Jonathan	799574634		Active	412011:Peds-Hematology/Oncology	Clinical Assistant Professor	Permanent	41,920.00
Adorama, Marci	794837486		Active	330100:Kenan-Flagler Bus Sch	Associate Professor	Permanent	33,922.00
Agorable, Tannis	791324354	00060365	Active	635100:Institute of Marine Sciences	Research Technician	Permanent	41,920.00
Bessemer, Raymond	798577366	00061910	Active	420102:Med Ad-Fin and Bus Operations	Accounting Technician	Permanent	33,922.00
Crankerson, Crabbie	792312312	01146439	Active	631300:H W Odum Inst Res Social Sci	Intermittent Temp	Temporary	41,920.00
Dankerson, Dabby	790700500	20017913	Active	506500:UNC Global	SPA Student Assistant	Temporary	33,922.00
Gecko, Geico	799080706		Active	311900:Philosophy	Lecturer	Temporary	41,920.00

HR Reporting – Employee Details

Employee Details


Employees
Positions
Reports
Request
Payroll
Forms
Affiliates
Faculty Status
Return to List
Profile
Employee Request
Evaluation History
Performance Management
Performance Management 2015
Performance Management 2016
Excel
Print
Help

Fitchie, Abercrombie 793199781

Job Dept	382000:SW–Research Projects	Position #	00060950	Type	SPA	Pay Status	Active
Job Title	Graphic Designer	Position Type	Regular	Total Active FTE	0.8		
				Infoporte Requests	0 In Progress / 0 Closed		

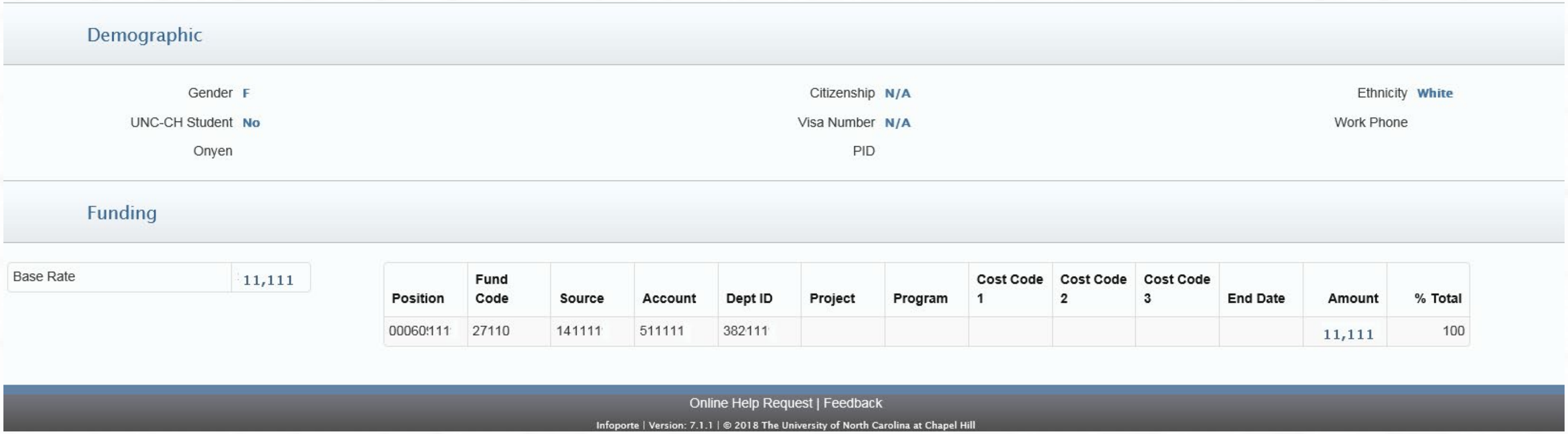
SPA

Employee	Fitchie, Abercrombie	PID	793199781		
Job Dept	382000	Position #	00060950	Pay Status	A
Job Title	Visual Arts Specialist	Position Type	Regular	Pay Cycle	B
Working Title	Graphic Designer	FTE	0.8	Expected Job End Date	
Position Competency	CTB	Start Date	01/14/2013	TSSD	01/01/2013
Action Code	PAY	Action Date	09/05/2018	Action Reason	LSI
Communicable Disease Mand.		Severe Weather Essential	N	DOB	
Probationary Status End	04/14/2013	TIM Approver		email	
Supervisor		Job End Date		Probationary End Date	
Time-Limited	N	Time-Limited End Date			

Rcd #	Posn #	Title	Dept	Start Date	Exp. End Date	Job End Date	FTE
0	00060950	* Visual Arts Specialist	382000:SW -Research Projects	01/14/2013			.8

HR Reporting – Employee Details

Employee Details Screen Bottom Half



Demographic

Gender	F	Citizenship	N/A	Ethnicity	White
UNC-CH Student	No	Visa Number	N/A	Work Phone	
Onyen		PID			

Funding

Base Rate	11,111

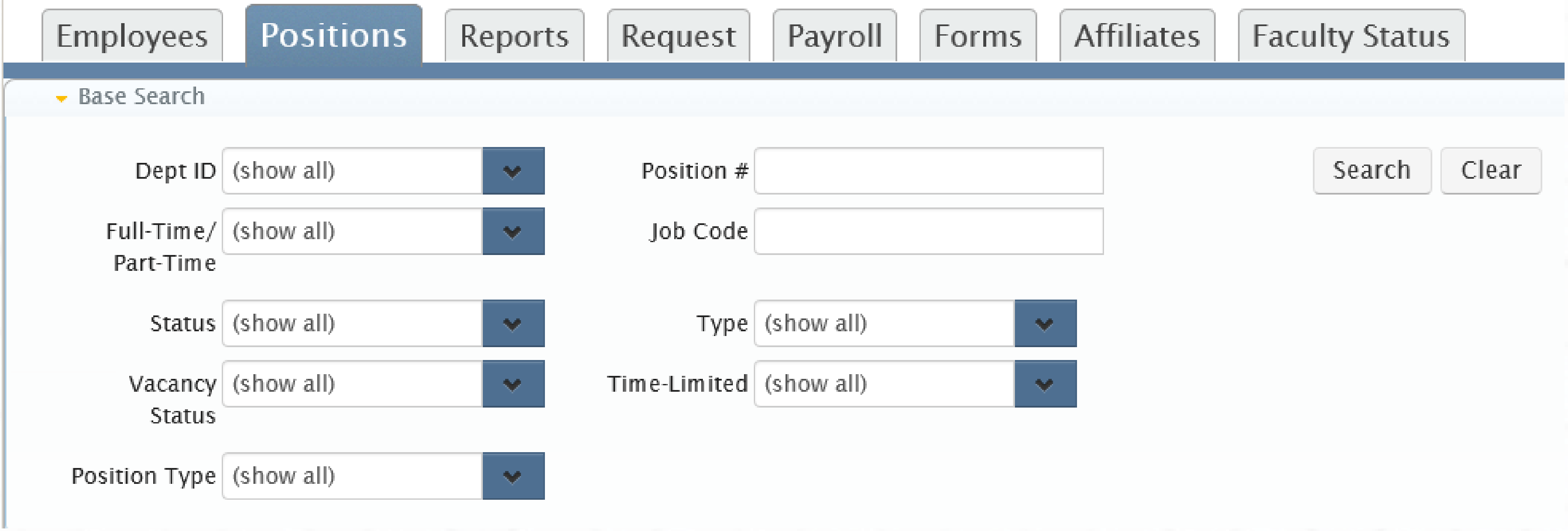
Position	Fund Code	Source	Account	Dept ID	Project	Program	Cost Code 1	Cost Code 2	Cost Code 3	End Date	Amount	% Total
00060111	27110	141111	511111	382111							11,111	100

Online Help Request | Feedback

Infoporte | Version: 7.1.1 | © 2018 The University of North Carolina at Chapel Hill

HR Reporting – Positions List

Positions List Filters


Employees
Positions
Reports
Request
Payroll
Forms
Affiliates
Faculty Status
Base Search
Search
Clear

Dept ID (show all)

Position #

Full-Time/ Part-Time (show all)

Job Code

Status (show all)

Type (show all)

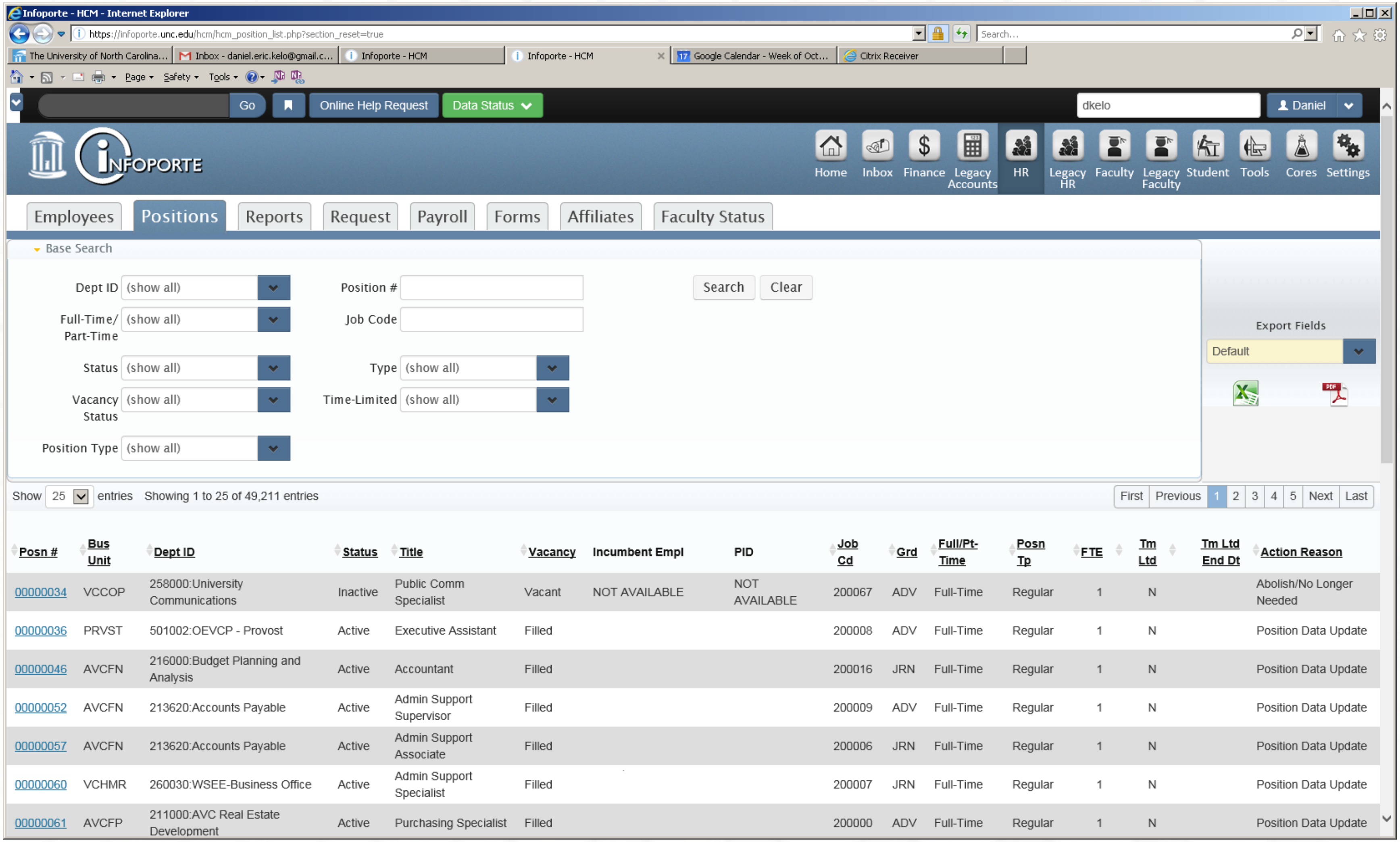
Vacancy Status (show all)

Time-Limited (show all)

Position Type (show all)

HR Reporting – Positions List

Positions List


Infoporte - HCM - Internet Explorer
https://infoporte.unc.edu/hcm/hcm_position_list.php?section_reset=true
The University of North Carolina...
Inbox - daniel.eric.kelo@gmail.c...
Infoporte - HCM
Infoporte - HCM
Google Calendar - Week of Oct...
Citrix Receiver
Page
Safety
Tools
Go
Online Help Request
Data Status
dkelo
Daniel
INFOPORTE
Home
Inbox
Finance
Legacy Accounts
HR
Legacy HR
Faculty
Legacy Faculty
Student
Tools
Cores
Settings
Employees
Positions
Reports
Request
Payroll
Forms
Affiliates
Faculty Status
Base Search
Search
Clear
Export Fields
First
Previous
1
2
3
4
5
Next
Last

Dept ID: (show all)
Full-Time/Part-Time: (show all)
Status: (show all)
Vacancy Status: (show all)
Position Type: (show all)
Position #:
Job Code:
Type: (show all)
Time-Limited: (show all)
Export Fields: Default

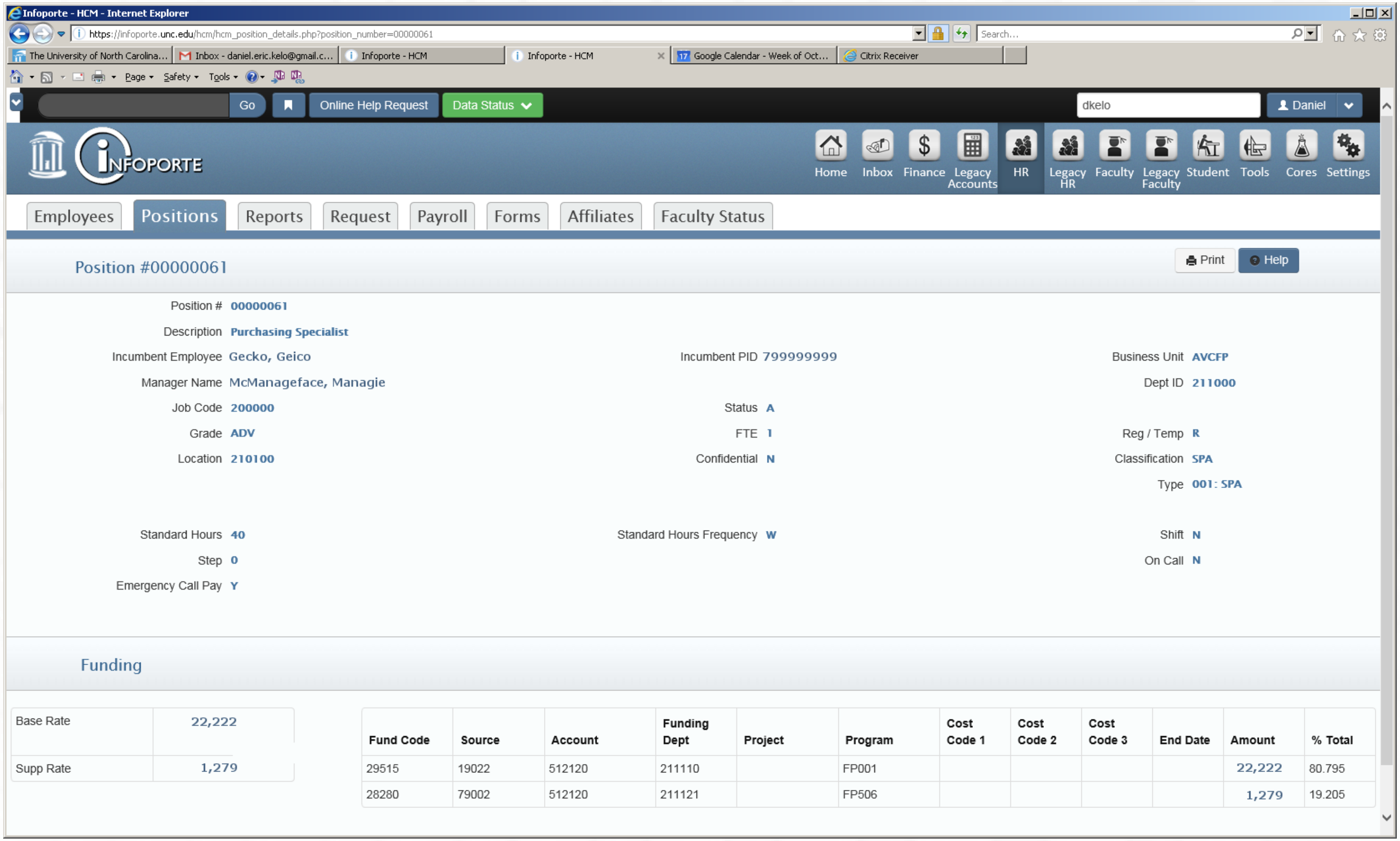
Show 25 entries Showing 1 to 25 of 49,211 entries

Posn #	Bus Unit	Dept ID	Status	Title	Vacancy	Incumbent Empl	PID	Job Cd	Grd	Full/Pt-Time	Posn Tp	FTE	Tm Ltd	Tm Ltd End Dt	Action Reason
00000034	VCCOP	258000:University Communications	Inactive	Public Comm Specialist	Vacant	NOT AVAILABLE	NOT AVAILABLE	200067	ADV	Full-Time	Regular	1	N		Abolish/No Longer Needed
00000036	PRVST	501002:OEVCP - Provost	Active	Executive Assistant	Filled			200008	ADV	Full-Time	Regular	1	N		Position Data Update
00000046	AVCFN	216000:Budget Planning and Analysis	Active	Accountant	Filled			200016	JRN	Full-Time	Regular	1	N		Position Data Update
00000052	AVCFN	213620:Accounts Payable	Active	Admin Support Supervisor	Filled			200009	ADV	Full-Time	Regular	1	N		Position Data Update
00000057	AVCFN	213620:Accounts Payable	Active	Admin Support Associate	Filled			200006	JRN	Full-Time	Regular	1	N		Position Data Update
00000060	VCHMR	260030:WSEE-Business Office	Active	Admin Support Specialist	Filled			200007	JRN	Full-Time	Regular	1	N		Position Data Update
00000061	AVCFP	211000:AVC Real Estate Development	Active	Purchasing Specialist	Filled			200000	ADV	Full-Time	Regular	1	N		Position Data Update

Making the connections

HR Reporting – Positions

Position Details


Infoporte - HCM - Internet Explorer
https://infoporte.unc.edu/hcm/hcm_position_details.php?position_number=00000061
Search...
The University of North Carolina...
Inbox - daniel.eric.kelo@gmail.c...
Infoporte - HCM
Infoporte - HCM
Google Calendar - Week of Oct...
Citrix Receiver
Page
Safety
Tools
Go
Online Help Request
Data Status
dkelo
Daniel
INFOPORTE
Home
Inbox
Finance
Legacy Accounts
HR
Legacy HR
Faculty
Legacy Faculty
Student
Tools
Cores
Settings
Employees
Positions
Reports
Request
Payroll
Forms
Affiliates
Faculty Status
Print
Help

Position #00000061

Position # 00000061

Description Purchasing Specialist

Incumbent Employee Gecko, Geico

Incumbent PID 799999999

Business Unit AVCFP

Manager Name McManageface, Managie

Dept ID 211000

Job Code 200000

Status A

Grade ADV

FTE 1

Reg / Temp R

Location 210100

Confidential N

Classification SPA

Type 001: SPA

Standard Hours 40

Standard Hours Frequency W

Shift N

Step 0

On Call N

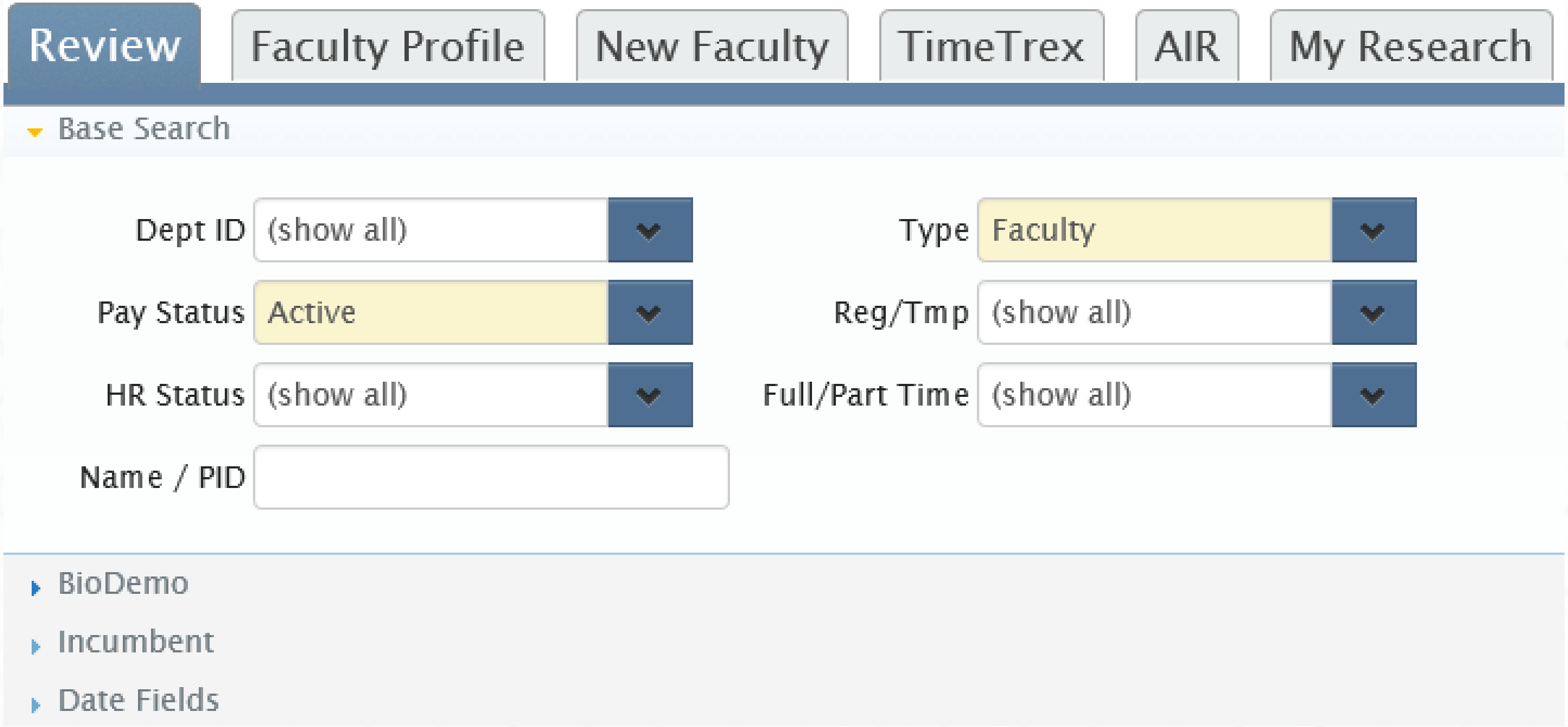
Emergency Call Pay Y

Funding

Base Rate	22,222
Supp Rate	1,279

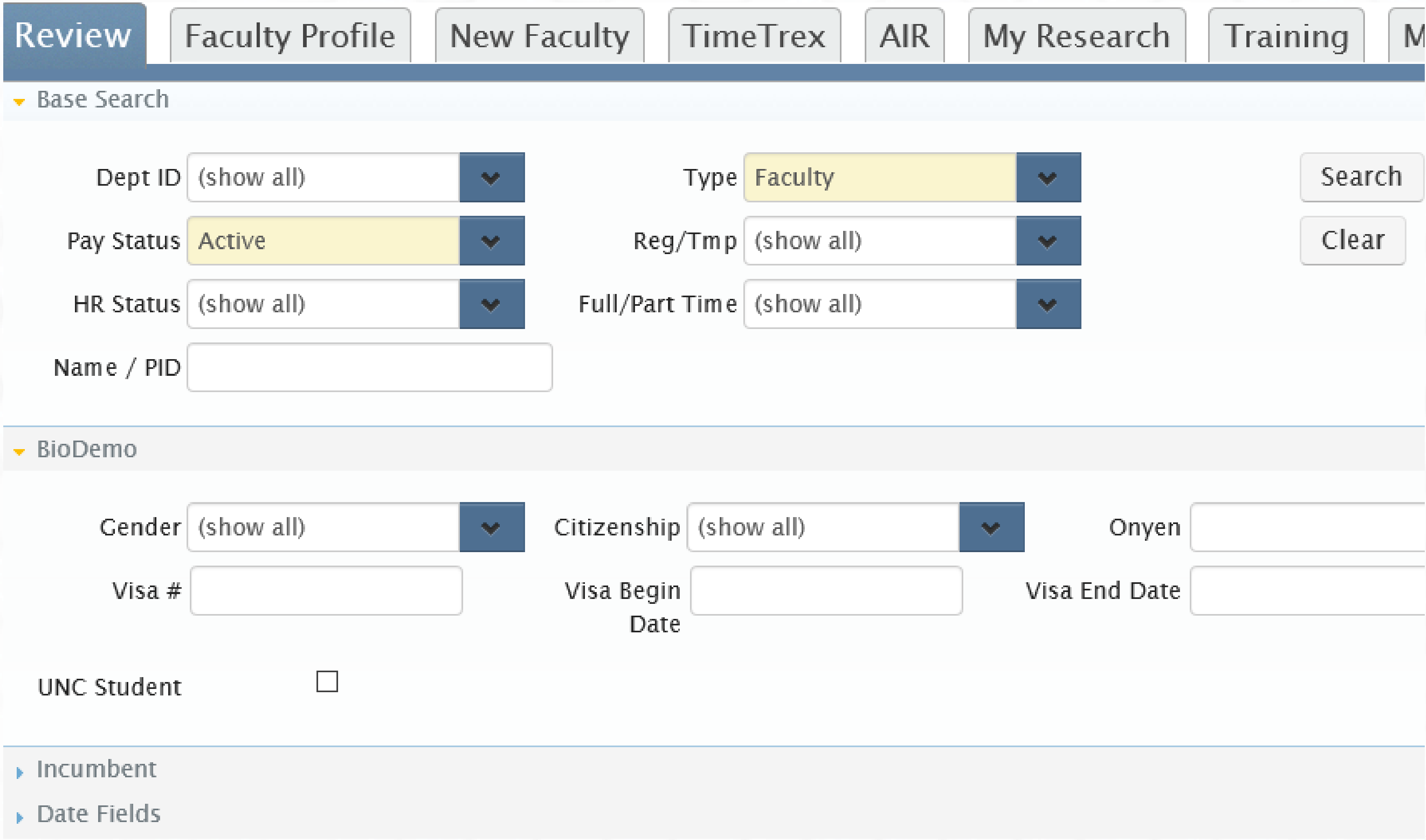
Fund Code	Source	Account	Funding Dept	Project	Program	Cost Code 1	Cost Code 2	Cost Code 3	End Date	Amount	% Total
29515	19022	512120	211110		FP001					22,222	80.795
28280	79002	512120	211121		FP506					1,279	19.205

Faculty Reporting – Faculty List Filters


Review
Faculty Profile
New Faculty
TimeTrex
AIR
My Research
Base Search
BioDemo
Incumbent
Date Fields

Dept ID (show all)
Type Faculty
Pay Status Active
Reg/Tmp (show all)
HR Status (show all)
Full/Part Time (show all)
Name / PID

Faculty Reporting – Review List Filters


Review
Faculty Profile
New Faculty
TimeTrex
AIR
My Research
Training
M
Search
Clear

Base Search

Dept ID (show all)
Type Faculty
Pay Status Active
Reg/Tmp (show all)
HR Status (show all)
Full/Part Time (show all)
Name / PID

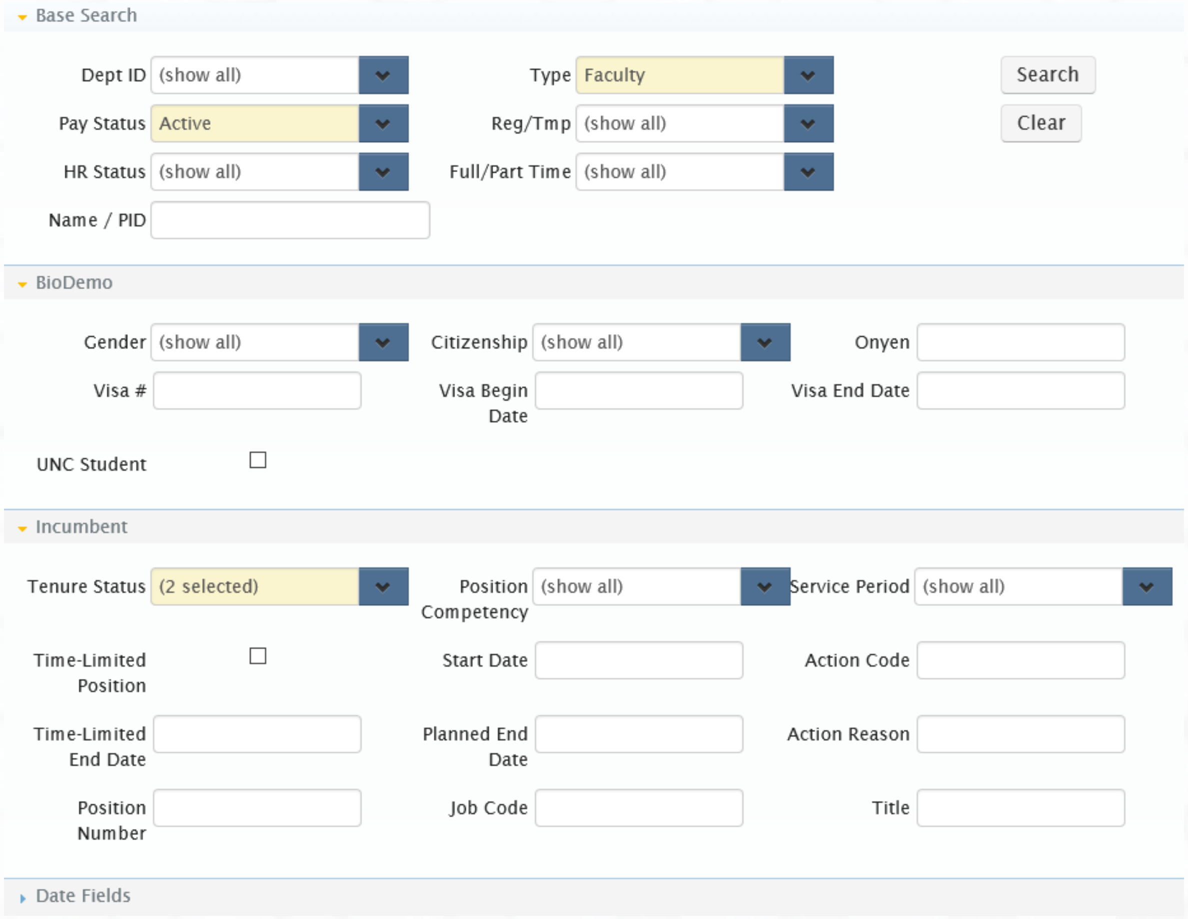
BioDemo

Gender (show all)
Citizenship (show all)
Onyen
Visa #
Visa Begin Date
Visa End Date
UNC Student ☐

Incumbent

Date Fields

Faculty Reporting – Review List Filters



Base Search

Dept ID: (show all)
Type: Faculty
Pay Status: Active
Reg/Tmp: (show all)
HR Status: (show all)
Full/Part Time: (show all)
Name / PID:

BioDemo

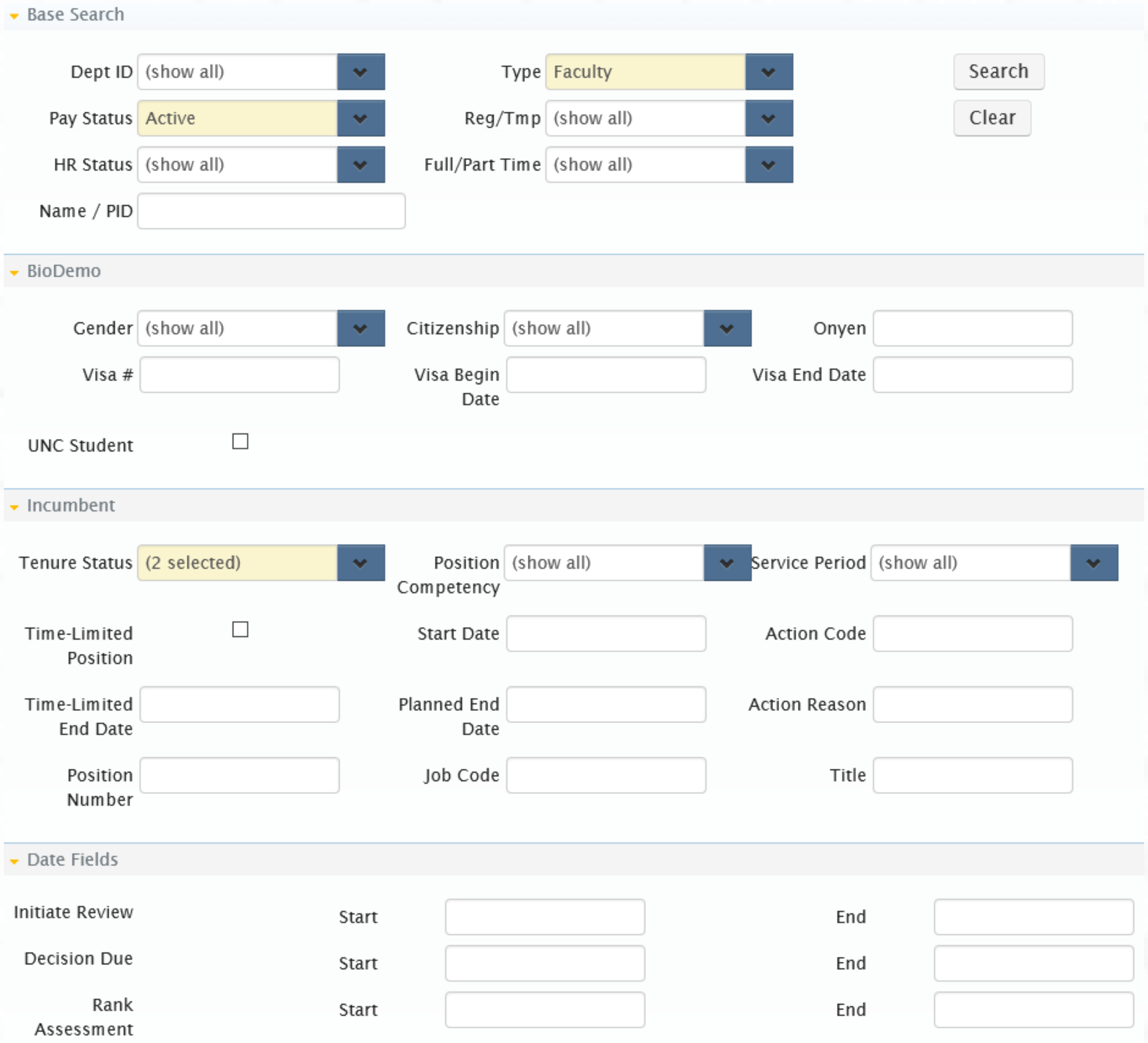
Gender: (show all)
Citizenship: (show all)
Onyen:
Visa #:
Visa Begin Date:
Visa End Date:
UNC Student ☐

Incumbent

Tenure Status: (2 selected)
Position Competency: (show all)
Service Period: (show all)
Time-Limited Position ☐
Start Date:
Action Code:
Time-Limited End Date:
Planned End Date:
Action Reason:
Position Number:
Job Code:
Title:

Date Fields

Faculty Reporting – Review List Filters



Base Search

Dept ID: (show all)
Type: Faculty
Pay Status: Active
Reg/Tmp: (show all)
HR Status: (show all)
Full/Part Time: (show all)
Name / PID:

BioDemo

Gender: (show all)
Citizenship: (show all)
Onyen:
Visa #:
Visa Begin Date:
Visa End Date:
UNC Student ☐

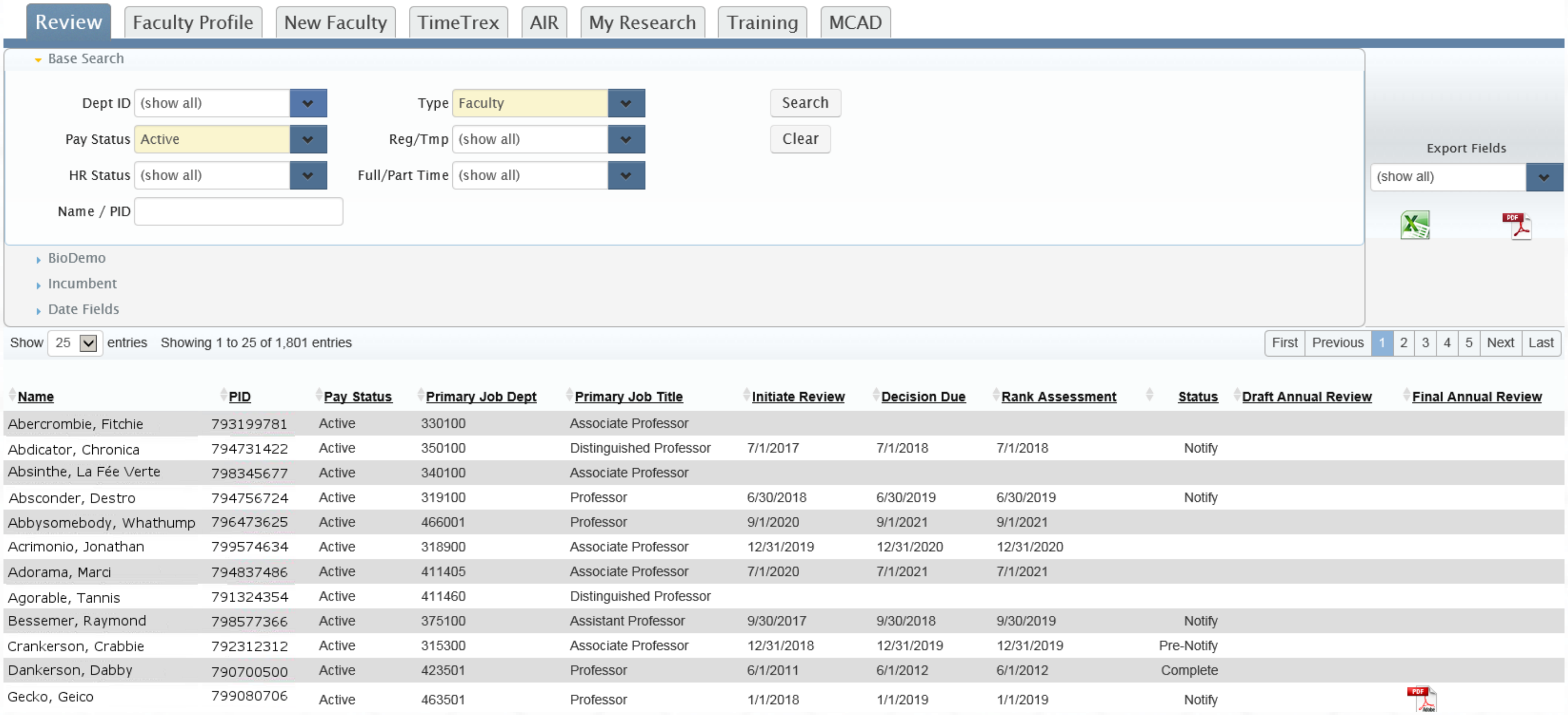
Incumbent

Tenure Status: (2 selected)
Position Competency: (show all)
Service Period: (show all)
Time-Limited Position ☐
Start Date:
Action Code:
Time-Limited End Date:
Planned End Date:
Action Reason:
Position Number:
Job Code:
Title:

Date Fields

Initiate Review: Start: End:
Decision Due: Start: End:
Rank Assessment: Start: End:

Faculty Reporting – Review List


Review
Faculty Profile
New Faculty
TimeTrex
AIR
My Research
Training
MCAD
Base Search
Search
Clear
Export Fields
BioDemo
Incumbent
Date Fields
First
Previous
1
2
3
4
5
Next
Last

Dept ID: (show all)
Pay Status: Active
HR Status: (show all)
Name / PID:
Type: Faculty
Reg/Tmp: (show all)
Full/Part Time: (show all)
Export Fields: (show all)

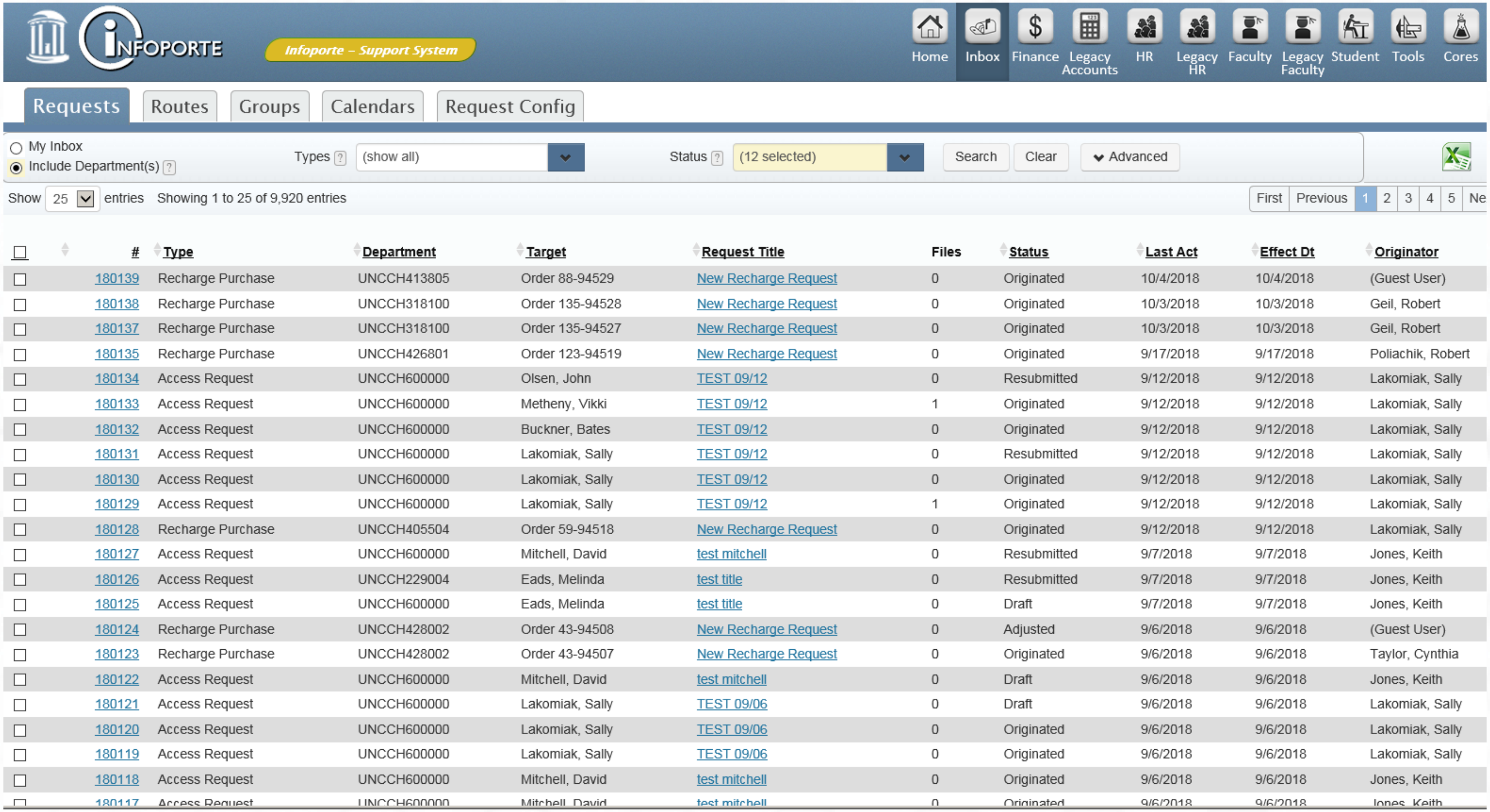
Show 25 entries Showing 1 to 25 of 1,801 entries

Name	PID	Pay Status	Primary Job Dept	Primary Job Title	Initiate Review	Decision Due	Rank Assessment	Status	Draft Annual Review	Final Annual Review
Abercrombie, Fitchie	793199781	Active	330100	Associate Professor						
Abdicator, Chronica	794731422	Active	350100	Distinguished Professor	7/1/2017	7/1/2018	7/1/2018	Notify		
Absinthe, La Fée Verte	798345677	Active	340100	Associate Professor						
Absconder, Destro	794756724	Active	319100	Professor	6/30/2018	6/30/2019	6/30/2019	Notify		
Abbysomebody, Whathump	796473625	Active	466001	Professor	9/1/2020	9/1/2021	9/1/2021			
Acrimonio, Jonathan	799574634	Active	318900	Associate Professor	12/31/2019	12/31/2020	12/31/2020			
Adorama, Marci	794837486	Active	411405	Associate Professor	7/1/2020	7/1/2021	7/1/2021			
Agorable, Tannis	791324354	Active	411460	Distinguished Professor						
Bessemer, Raymond	798577366	Active	375100	Assistant Professor	9/30/2017	9/30/2018	9/30/2019	Notify		
Crankerson, Crabbie	792312312	Active	315300	Associate Professor	12/31/2018	12/31/2019	12/31/2019	Pre-Notify		
Dankerson, Dabby	790700500	Active	423501	Professor	6/1/2011	6/1/2012	6/1/2012	Complete		
Gecko, Geico	799080706	Active	463501	Professor	1/1/2018	1/1/2019	1/1/2019	Notify		PDF

Faculty Reporting – Faculty Details

- Faculty Details screen much like Employee Details
- Additional fields include tenure status, granted date, review date, service period, etc.
- Additional tabs allow self-service for CV, publications, etc.

Miscellaneous - Inbox



○ My Inbox
● Include Department(s)

Types: (show all)

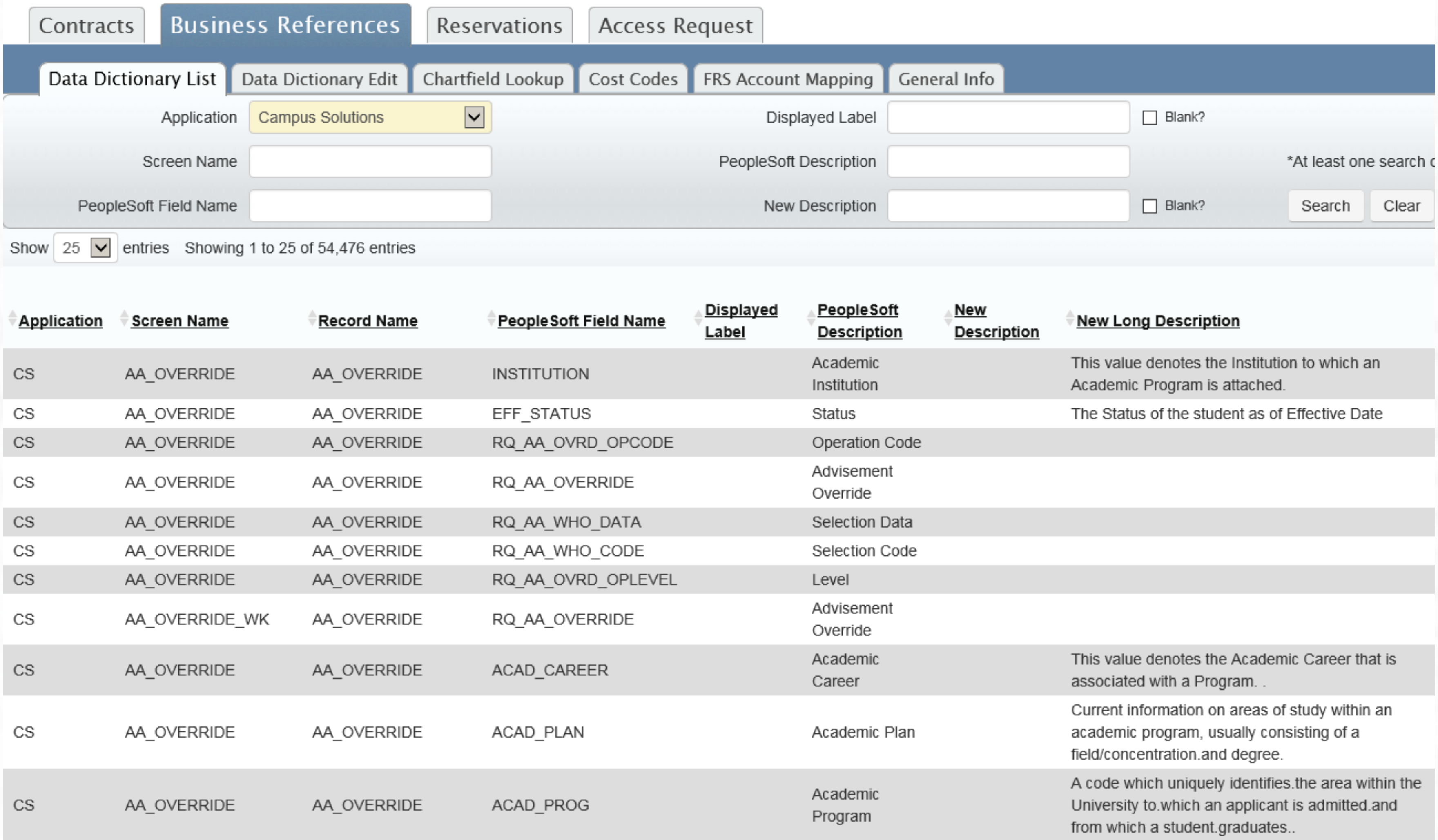
Status: (12 selected)

Show 25 entries Showing 1 to 25 of 9,920 entries

☐	#	Type	Department	Target	Request Title	Files	Status	Last Act	Effect Dt	Originator
☐	180139	Recharge Purchase	UNCCH413805	Order 88-94529	New Recharge Request	0	Originated	10/4/2018	10/4/2018	(Guest User)
☐	180138	Recharge Purchase	UNCCH318100	Order 135-94528	New Recharge Request	0	Originated	10/3/2018	10/3/2018	Geil, Robert
☐	180137	Recharge Purchase	UNCCH318100	Order 135-94527	New Recharge Request	0	Originated	10/3/2018	10/3/2018	Geil, Robert
☐	180135	Recharge Purchase	UNCCH426801	Order 123-94519	New Recharge Request	0	Originated	9/17/2018	9/17/2018	Poliachik, Robert
☐	180134	Access Request	UNCCH600000	Olsen, John	TEST 09/12	0	Resubmitted	9/12/2018	9/12/2018	Lakomiak, Sally
☐	180133	Access Request	UNCCH600000	Metheny, Vikki	TEST 09/12	1	Originated	9/12/2018	9/12/2018	Lakomiak, Sally
☐	180132	Access Request	UNCCH600000	Buckner, Bates	TEST 09/12	0	Originated	9/12/2018	9/12/2018	Lakomiak, Sally
☐	180131	Access Request	UNCCH600000	Lakomiak, Sally	TEST 09/12	0	Resubmitted	9/12/2018	9/12/2018	Lakomiak, Sally
☐	180130	Access Request	UNCCH600000	Lakomiak, Sally	TEST 09/12	0	Originated	9/12/2018	9/12/2018	Lakomiak, Sally
☐	180129	Access Request	UNCCH600000	Lakomiak, Sally	TEST 09/12	1	Originated	9/12/2018	9/12/2018	Lakomiak, Sally
☐	180128	Recharge Purchase	UNCCH405504	Order 59-94518	New Recharge Request	0	Originated	9/12/2018	9/12/2018	Lakomiak, Sally
☐	180127	Access Request	UNCCH600000	Mitchell, David	test mitchell	0	Resubmitted	9/7/2018	9/7/2018	Jones, Keith
☐	180126	Access Request	UNCCH229004	Eads, Melinda	test title	0	Resubmitted	9/7/2018	9/7/2018	Jones, Keith
☐	180125	Access Request	UNCCH600000	Eads, Melinda	test title	0	Draft	9/7/2018	9/7/2018	Jones, Keith
☐	180124	Recharge Purchase	UNCCH428002	Order 43-94508	New Recharge Request	0	Adjusted	9/6/2018	9/6/2018	(Guest User)
☐	180123	Recharge Purchase	UNCCH428002	Order 43-94507	New Recharge Request	0	Originated	9/6/2018	9/6/2018	Taylor, Cynthia
☐	180122	Access Request	UNCCH600000	Mitchell, David	test mitchell	0	Draft	9/6/2018	9/6/2018	Jones, Keith
☐	180121	Access Request	UNCCH600000	Lakomiak, Sally	TEST 09/06	0	Draft	9/6/2018	9/6/2018	Lakomiak, Sally
☐	180120	Access Request	UNCCH600000	Lakomiak, Sally	TEST 09/06	0	Originated	9/6/2018	9/6/2018	Lakomiak, Sally
☐	180119	Access Request	UNCCH600000	Lakomiak, Sally	TEST 09/06	0	Originated	9/6/2018	9/6/2018	Lakomiak, Sally
☐	180118	Access Request	UNCCH600000	Mitchell, David	test mitchell	0	Originated	9/6/2018	9/6/2018	Jones, Keith
☐	180117	Access Request	UNCCH600000	Mitchell, David	test mitchell	0	Originated	9/6/2018	9/6/2018	Jones, Keith

Misc. Infoporte Functionality

Miscellaneous – Business Reference


Contracts
Business References
Reservations
Access Request
Data Dictionary List
Data Dictionary Edit
Chartfield Lookup
Cost Codes
FRS Account Mapping
General Info
Search
Clear

Application: Campus Solutions
Screen Name:
PeopleSoft Field Name:
Displayed Label: ☐ Blank?
PeopleSoft Description:
New Description: ☐ Blank?
*At least one search c

Show 25 entries Showing 1 to 25 of 54,476 entries

Application	Screen Name	Record Name	PeopleSoft Field Name	Displayed Label	PeopleSoft Description	New Description	New Long Description
CS	AA_OVERRIDE	AA_OVERRIDE	INSTITUTION		Academic Institution		This value denotes the Institution to which an Academic Program is attached.
CS	AA_OVERRIDE	AA_OVERRIDE	EFF_STATUS		Status		The Status of the student as of Effective Date
CS	AA_OVERRIDE	AA_OVERRIDE	RQ_AA_OVRD_OPCODE		Operation Code		
CS	AA_OVERRIDE	AA_OVERRIDE	RQ_AA_OVERRIDE		Advisement Override		
CS	AA_OVERRIDE	AA_OVERRIDE	RQ_AA_WHO_DATA		Selection Data		
CS	AA_OVERRIDE	AA_OVERRIDE	RQ_AA_WHO_CODE		Selection Code		
CS	AA_OVERRIDE	AA_OVERRIDE	RQ_AA_OVRD_OPLEVEL		Level		
CS	AA_OVERRIDE_WK	AA_OVERRIDE	RQ_AA_OVERRIDE		Advisement Override		
CS	AA_OVERRIDE	AA_OVERRIDE	ACAD_CAREER		Academic Career		This value denotes the Academic Career that is associated with a Program. .
CS	AA_OVERRIDE	AA_OVERRIDE	ACAD_PLAN		Academic Plan		Current information on areas of study within an academic program, usually consisting of a field/concentration.and degree.
CS	AA_OVERRIDE	AA_OVERRIDE	ACAD_PROG		Academic Program		A code which uniquely identifies.the area within the University to.which an applicant is admitted.and from which a student.graduates..

Misc. Infoporte Functionality

Questions?

- What questions do you have for me now?
- We will have a longer Q&A at the end of the presentation

Misc. Infoporte Functionality

Hand-off

The Recharge of R & R:

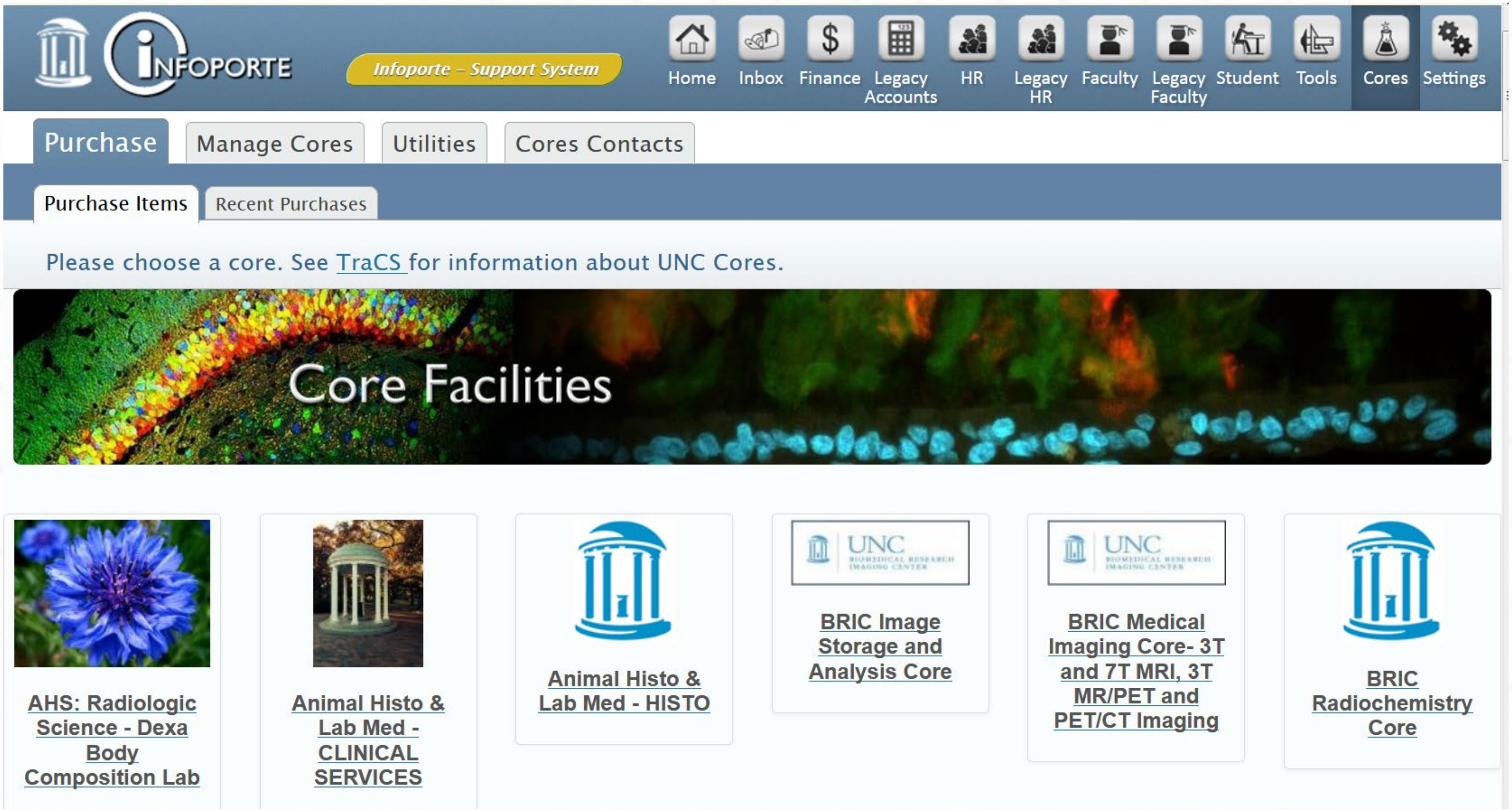
- Recharge/Cores Reports
- Defining a Core
- How We Make Ordering Easier & Faster
- Questions

Infoporte Recharge/Cores Reports & Easy Recharge Ordering

Bob Poliachik

ERDS Applications Specialist

Infoporte Recharge/Cores


INFOPORTE
Infoporte – Support System
Home
Inbox
Finance
Legacy Accounts
HR
Legacy HR
Faculty
Legacy Faculty
Student
Tools
Cores
Settings
Purchase
Manage Cores
Utilities
Cores Contacts
Purchase Items
Recent Purchases
Core Facilities
UNC Biomedical Research Imaging Center

Please choose a core. See TraCS for information about UNC Cores.

AHS: Radiologic Science - Dexa Body Composition Lab

Animal Histo & Lab Med - CLINICAL SERVICES

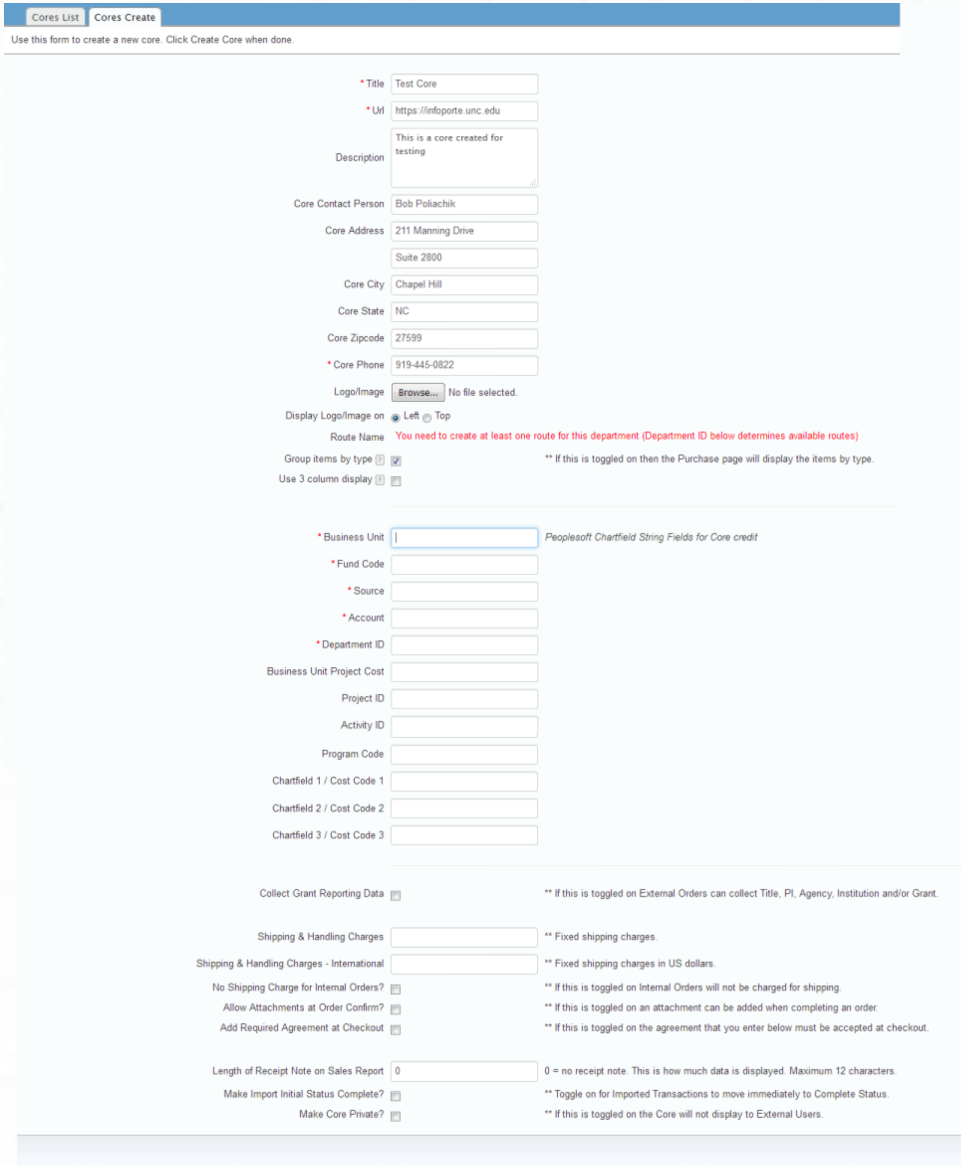
Animal Histo & Lab Med - HISTO

BRIC Image Storage and Analysis Core

BRIC Medical Imaging Core- 3T and 7T MRI, 3T MR/PET and PET/CT Imaging

BRIC Radiochemistry Core

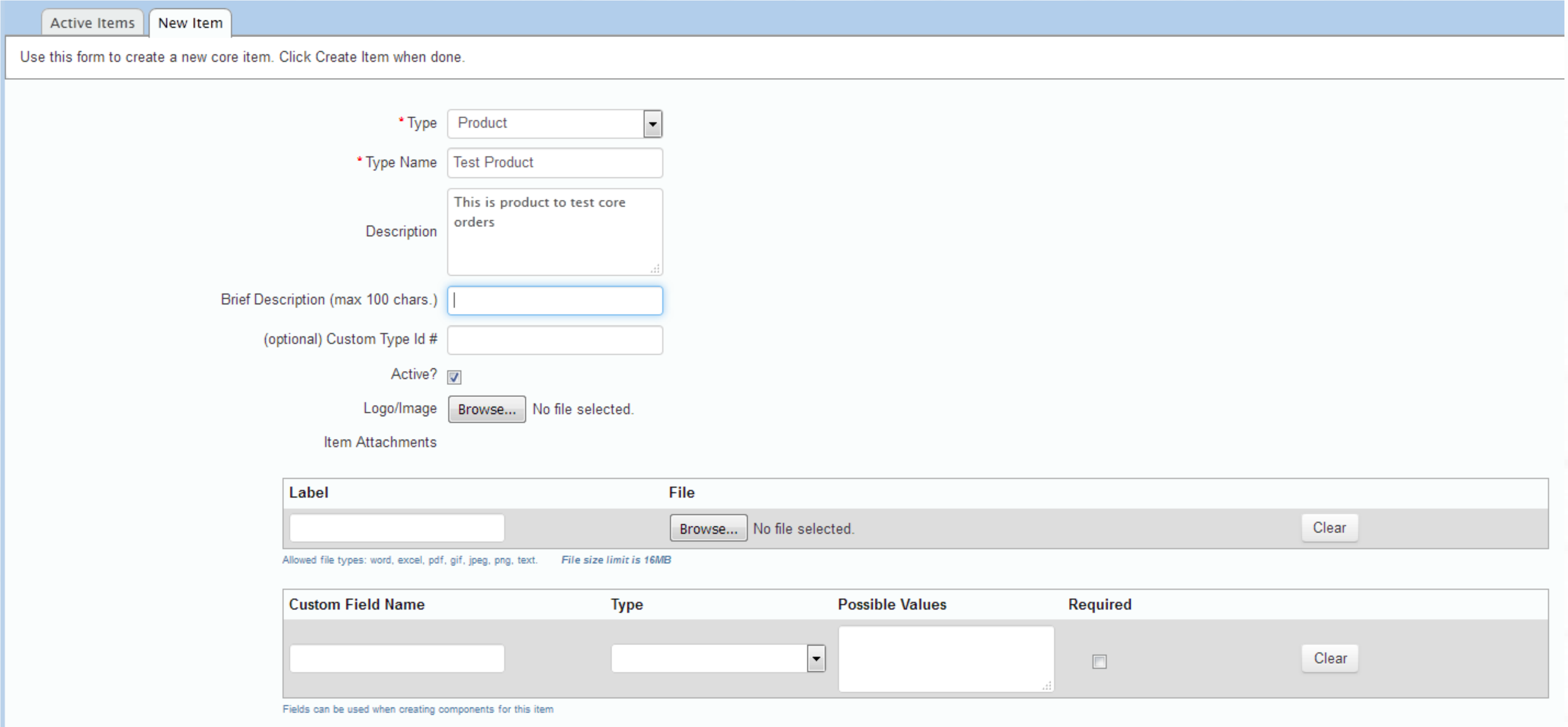
Defining A Core



Use this form to create a new core. Click Create Core when done.

* Title	Test Core	
* Url	https://infoporte.unc.edu	
Description	This is a core created for testing	
Core Contact Person	Bob Poliachik	
Core Address	211 Manning Drive	
	Suite 2800	
Core City	Chapel Hill	
Core State	NC	
Core Zipcode	27599	
* Core Phone	919-445-0822	
Logo/Image	Browse... No file selected.	
Display Logo/Image on	● Left ○ Top	
Route Name	You need to create at least one route for this department (Department ID below determines available routes)	
Group items by type	☑	** If this is toggled on then the Purchase page will display the items by type.
Use 3 column display	☐	
* Business Unit		*Peoplesoft Chartfield String Fields for Core credit*
* Fund Code		
* Source		
* Account		
* Department ID		
Business Unit Project Cost		
Project ID		
Activity ID		
Program Code		
Chartfield 1 / Cost Code 1		
Chartfield 2 / Cost Code 2		
Chartfield 3 / Cost Code 3		
Collect Grant Reporting Data	☐	** If this is toggled on External Orders can collect Title, PI, Agency, Institution and/or Grant.
Shipping & Handling Charges		** Fixed shipping charges.
Shipping & Handling Charges - International		** Fixed shipping charges in US dollars.
No Shipping Charge for Internal Orders?	☐	** If this is toggled on Internal Orders will not be charged for shipping.
Allow Attachments at Order Confirm?	☐	** If this is toggled on an attachment can be added when completing an order.
Add Required Agreement at Checkout	☐	** If this is toggled on the agreement that you enter below must be accepted at checkout.
Length of Receipt Note on Sales Report	0	0 = no receipt note. This is how much data is displayed. Maximum 12 characters.
Make Import Initial Status Complete?	☐	** Toggle on for Imported Transactions to move immediately to Complete Status.
Make Core Private?	☐	** If this is toggled on the Core will not display to External Users.

Defining A Core Item



Use this form to create a new core item. Click Create Item when done.

* Type	Product
* Type Name	Test Product
Description	This is product to test core orders
Brief Description (max 100 chars.)	
(optional) Custom Type Id #	
Active?	☑
Logo/Image	No file selected.
Item Attachments	

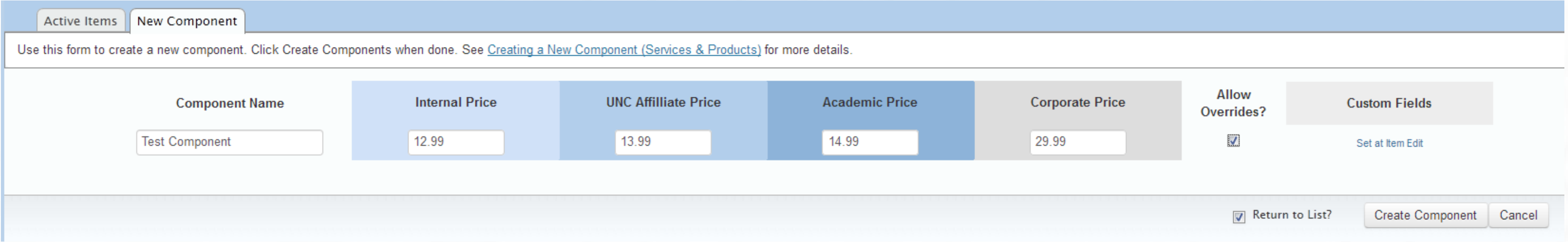
Label	File
	No file selected.

Allowed file types: word, excel, pdf, gif, jpeg, png, text. *File size limit is 16MB*

Custom Field Name	Type	Possible Values	Required
			☐

Fields can be used when creating components for this item

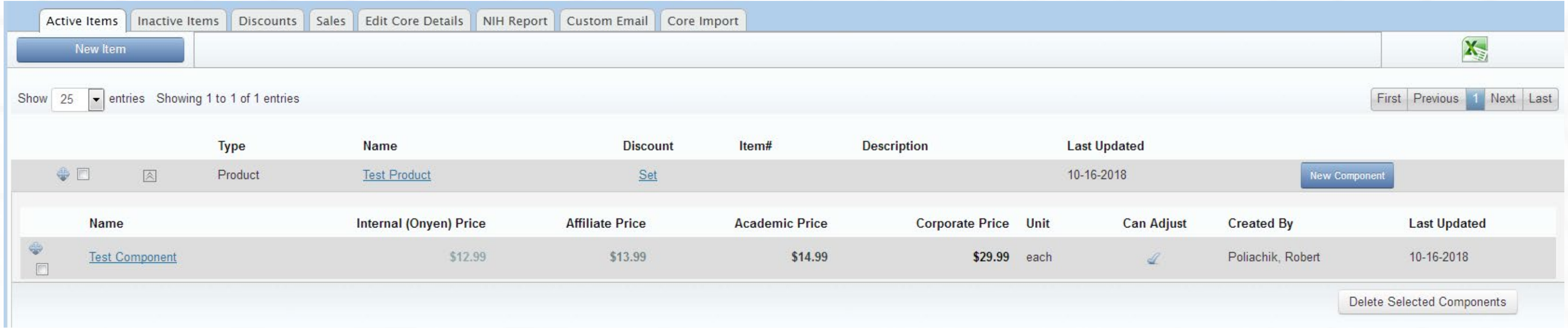
Cores Create Component


Active Items
New Component
Set at Item Edit
Create Component
Cancel

Use this form to create a new component. Click Create Components when done. See Creating a New Component (Services & Products) for more details.

Component Name	Internal Price	UNC Affilliate Price	Academic Price	Corporate Price	Allow Overrides?	Custom Fields
Test Component	12.99	13.99	14.99	29.99	☑	Set at Item Edit

☑ Return to List?

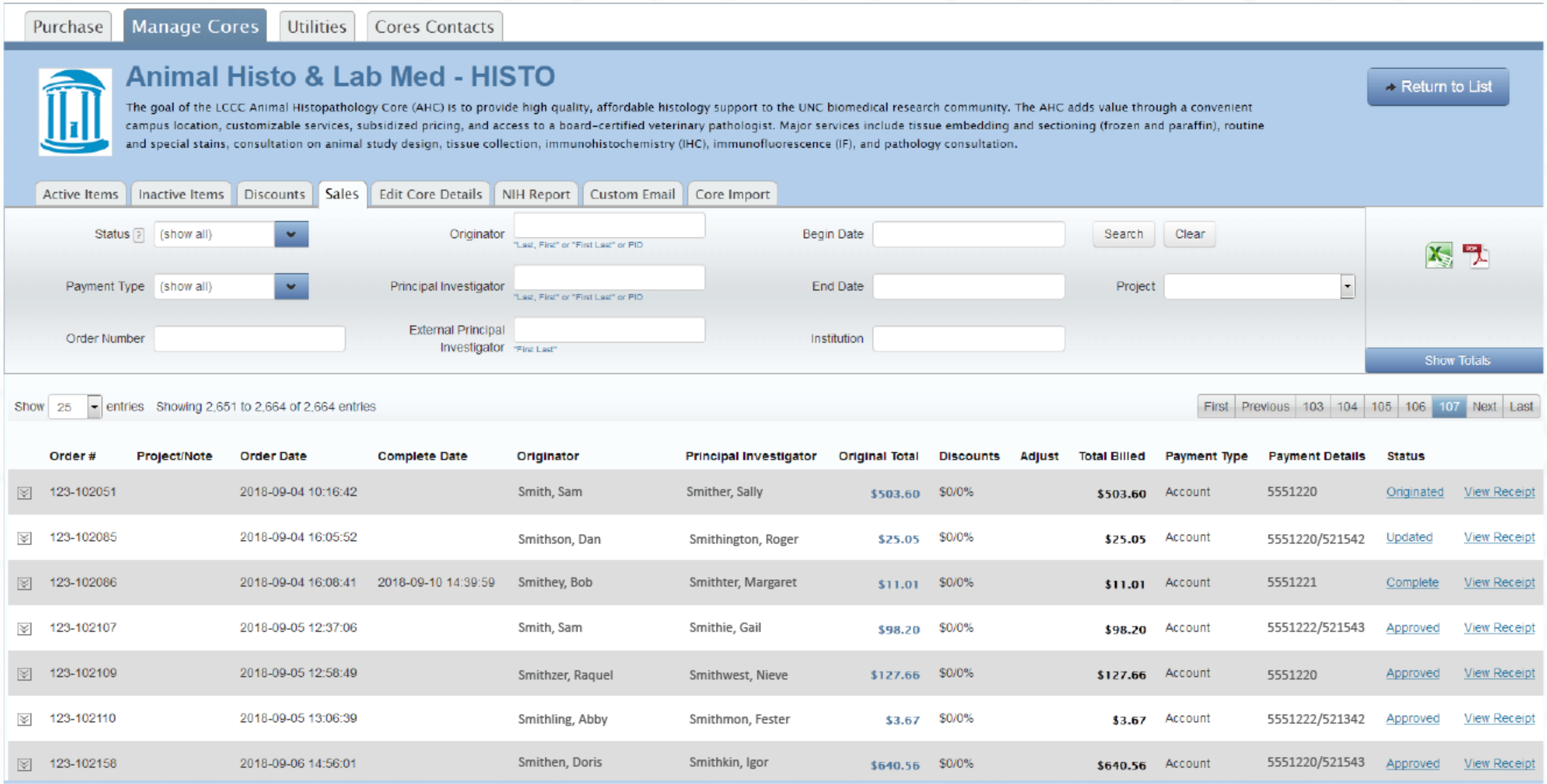

Active Items
Inactive Items
Discounts
Sales
Edit Core Details
NIH Report
Custom Email
Core Import
New Item
First
Previous
1
Next
Last
New Component
Delete Selected Components

Show 25 entries Showing 1 to 1 of 1 entries

	Type	Name	Discount	Item#	Description	Last Updated	
☐	Product	Test Product	Set			10-16-2018	New Component

	Name	Internal (Onyen) Price	Affiliate Price	Academic Price	Corporate Price	Unit	Can Adjust	Created By	Last Updated
☐	Test Component	$12.99	$13.99	$14.99	$29.99	each	✓	Poliachik, Robert	10-16-2018

Recharge/Core Sales Report


Purchase
Manage Cores
Utilities
Cores Contacts
Return to List
Active Items
Inactive Items
Discounts
Sales
Edit Core Details
NIH Report
Custom Email
Core Import
Search
Clear
Show Totals
First
Previous
103
104
105
106
107
Next
Last

Animal Histo & Lab Med - HISTO

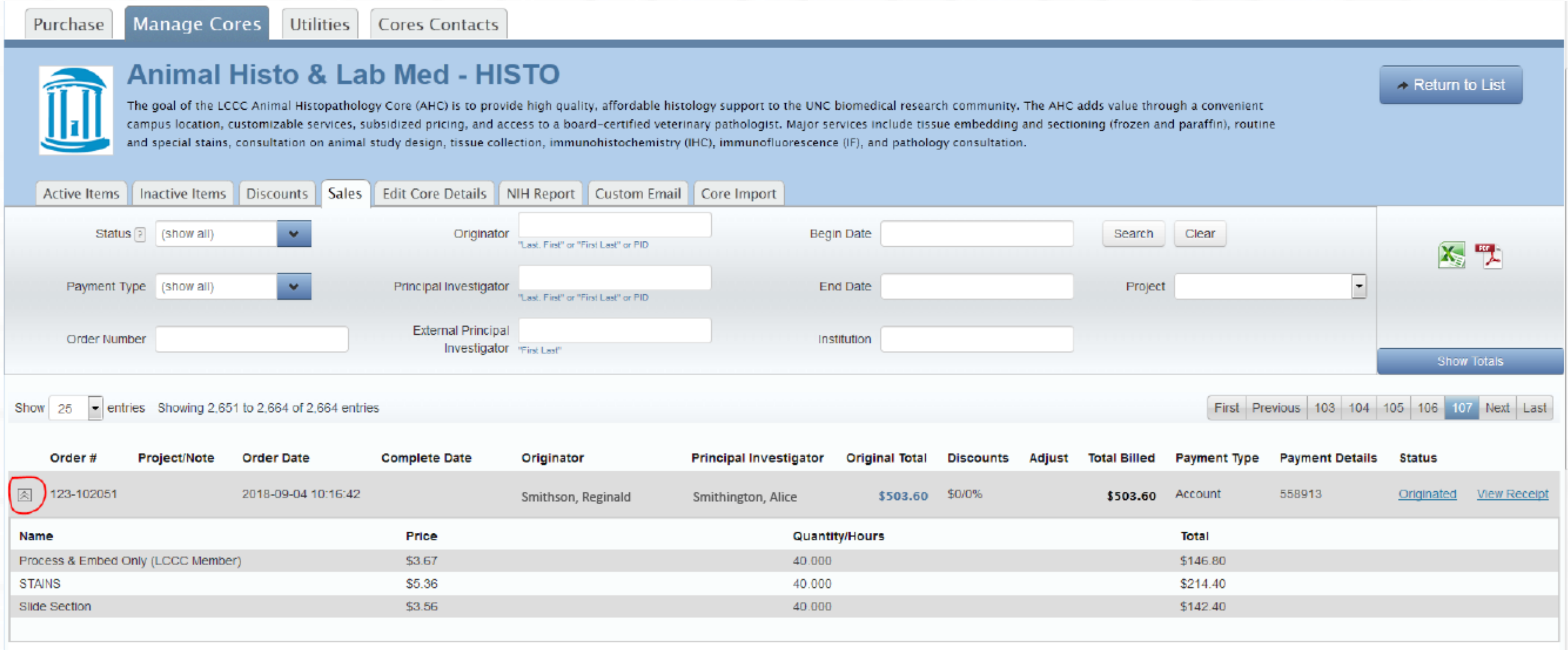
The goal of the LCCC Animal Histopathology Core (AHC) is to provide high quality, affordable histology support to the UNC biomedical research community. The AHC adds value through a convenient campus location, customizable services, subsidized pricing, and access to a board-certified veterinary pathologist. Major services include tissue embedding and sectioning (frozen and paraffin), routine and special stains, consultation on animal study design, tissue collection, immunohistochemistry (IHC), immunofluorescence (IF), and pathology consultation.

Status: (show all)
Payment Type: (show all)
Order Number:
Originator: "Last, First" or "First Last" or PID
Principal Investigator: "Last, First" or "First Last" or PID
External Principal Investigator: "First Last"
Begin Date:
End Date:
Institution:
Project:

Show 25 entries Showing 2,651 to 2,664 of 2,664 entries

	Order #	Project/Note	Order Date	Complete Date	Originator	Principal Investigator	Original Total	Discounts	Adjust	Total Billed	Payment Type	Payment Details	Status	
☒	123-102051		2018-09-04 10:16:42		Smith, Sam	Smither, Sally	$503.60	$0/0%		$503.60	Account	5551220	Originated	View Receipt
☒	123-102085		2018-09-04 16:05:52		Smithson, Dan	Smithington, Roger	$25.05	$0/0%		$25.05	Account	5551220/521542	Updated	View Receipt
☒	123-102086		2018-09-04 16:08:41	2018-09-10 14:39:59	Smithey, Bob	Smithter, Margaret	$11.01	$0/0%		$11.01	Account	5551221	Complete	View Receipt
☒	123-102107		2018-09-05 12:37:06		Smith, Sam	Smithie, Gail	$98.20	$0/0%		$98.20	Account	5551222/521543	Approved	View Receipt
☒	123-102109		2018-09-05 12:58:49		Smithzer, Raquel	Smithwest, Nieve	$127.66	$0/0%		$127.66	Account	5551220	Approved	View Receipt
☒	123-102110		2018-09-05 13:06:39		Smithling, Abby	Smithmon, Fester	$3.67	$0/0%		$3.67	Account	5551222/521342	Approved	View Receipt
☒	123-102158		2018-09-06 14:56:01		Smithen, Doris	Smithkin, Igor	$640.56	$0/0%		$640.56	Account	5551220/521543	Approved	View Receipt

Recharge/Core Sales - Expanded


Purchase
Manage Cores
Utilities
Cores Contacts
Return to List
Active Items
Inactive Items
Discounts
Sales
Edit Core Details
NIH Report
Custom Email
Core Import
Search
Clear
Show Totals
First
Previous
103
104
105
106
107
Next
Last

Animal Histo & Lab Med - HISTO

The goal of the LCCC Animal Histopathology Core (AHC) is to provide high quality, affordable histology support to the UNC biomedical research community. The AHC adds value through a convenient campus location, customizable services, subsidized pricing, and access to a board-certified veterinary pathologist. Major services include tissue embedding and sectioning (frozen and paraffin), routine and special stains, consultation on animal study design, tissue collection, immunohistochemistry (IHC), immunofluorescence (IF), and pathology consultation.

Status: (show all)
Payment Type: (show all)
Order Number:
Originator: "Last, First" or "First Last" or PID
Principal Investigator: "Last, First" or "First Last" or PID
External Principal Investigator: "First Last"
Begin Date:
End Date:
Institution:
Project:

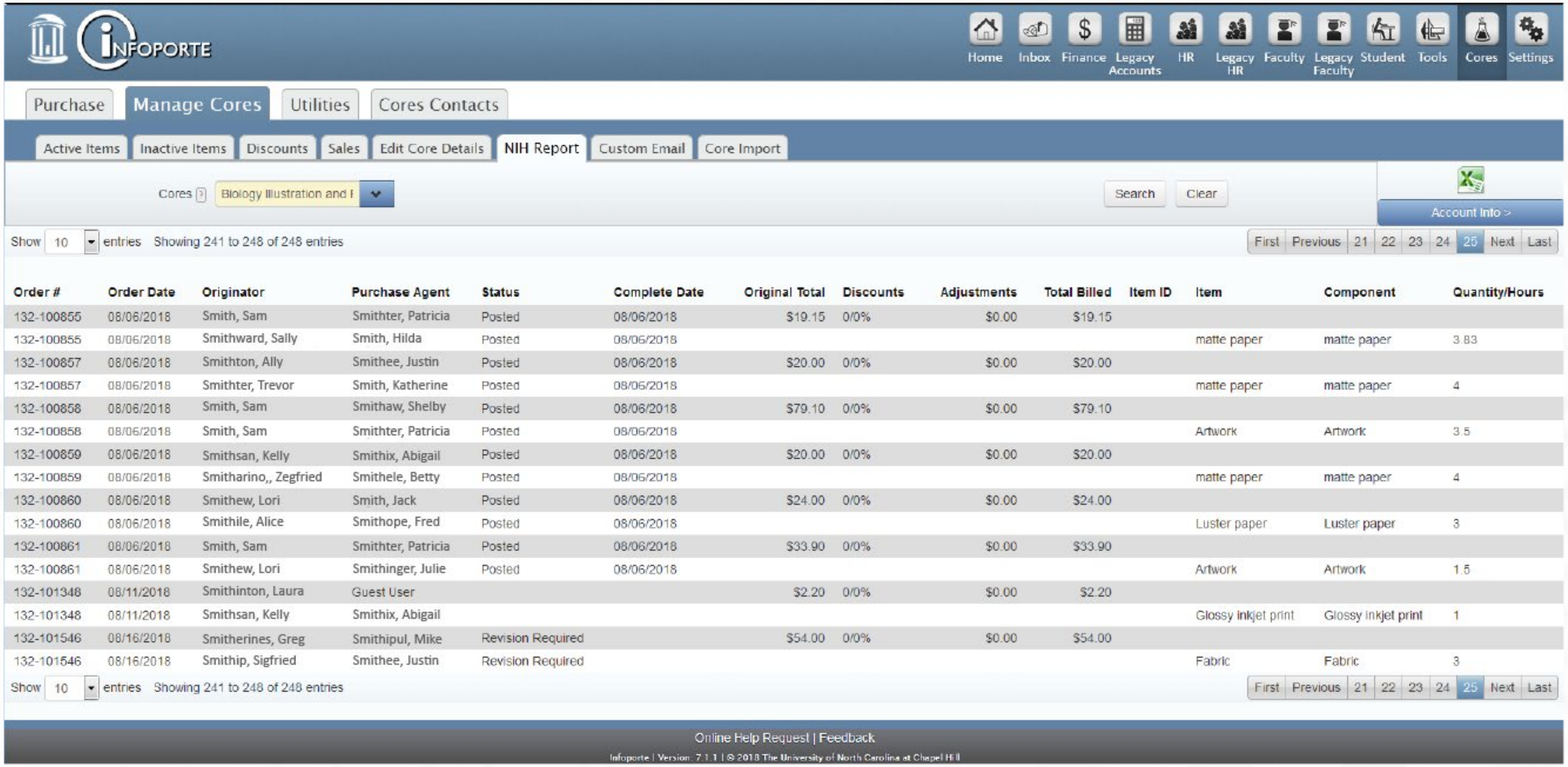
Show 25 entries Showing 2,651 to 2,664 of 2,664 entries

Order #	Project/Note	Order Date	Complete Date	Originator	Principal Investigator	Original Total	Discounts	Adjust	Total Billed	Payment Type	Payment Details	Status	
123-102051		2018-09-04 10:16:42		Smithson, Reginald	Smithington, Alice	$503.60	$0/0%		$503.60	Account	558913	Originated	View Receipt

Name	Price	Quantity/Hours	Total
Process & Embed Only (LCCC Member)	$3.67	40.000	$146.80
STAINS	$5.36	40.000	$214.40
Slide Section	$3.56	40.000	$142.40

Making the connections

Recharge/Core NIH Report


INFOPORTE
Home
Inbox
Finance
Legacy Accounts
HR
Legacy HR
Faculty
Legacy Faculty
Student
Tools
Cores
Settings
Purchase
Manage Cores
Utilities
Cores Contacts
Active Items
Inactive Items
Discounts
Sales
Edit Core Details
NIH Report
Custom Email
Core Import
Search
Clear
Account Info >
First
Previous
21
22
23
24
25
Next
Last
Online Help Request | Feedback

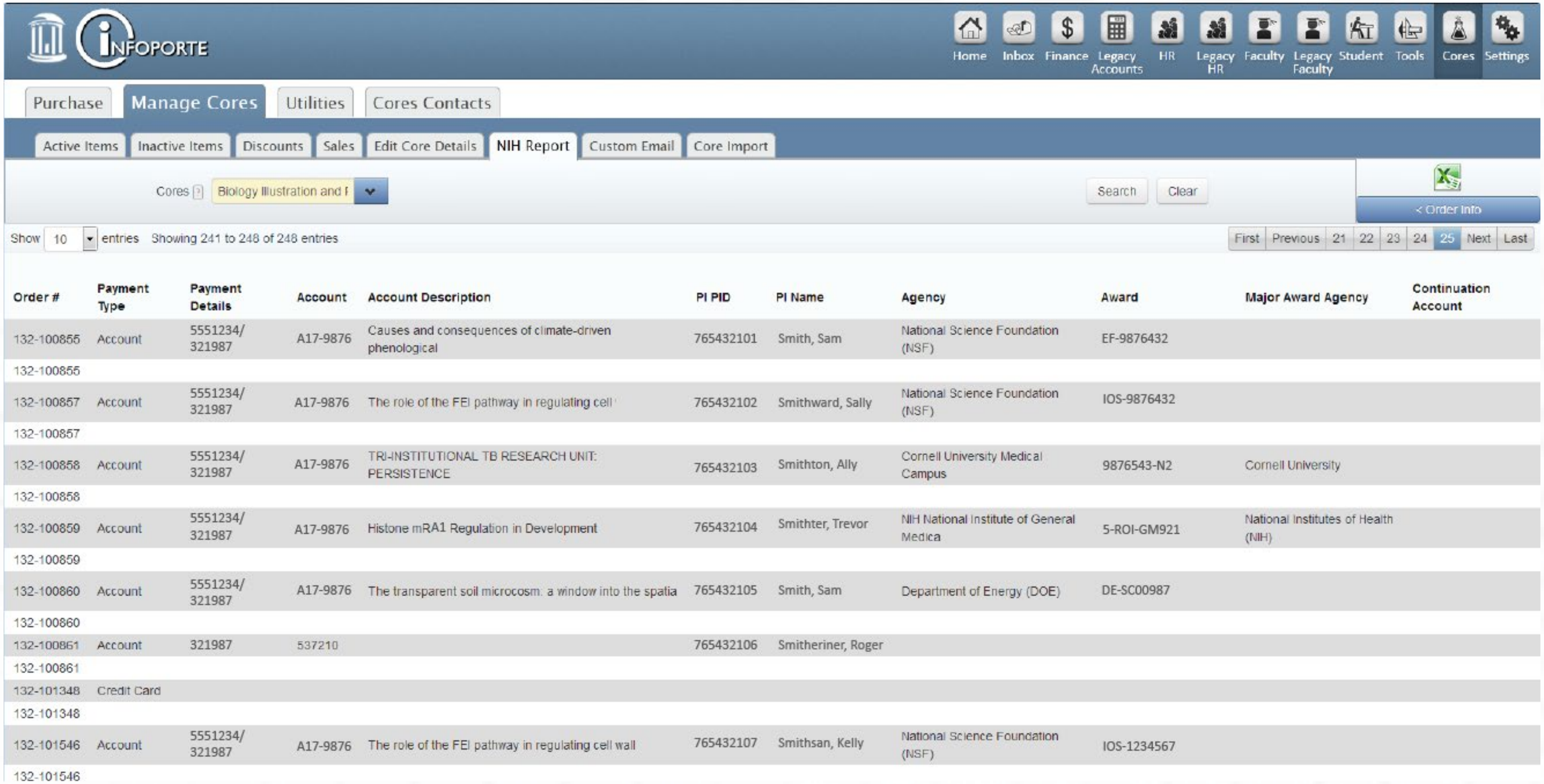
Cores: Biology Illustration and I

Show 10 entries Showing 241 to 248 of 248 entries

Order #	Order Date	Originator	Purchase Agent	Status	Complete Date	Original Total	Discounts	Adjustments	Total Billed	Item ID	Item	Component	Quantity/Hours
132-100855	08/06/2018	Smith, Sam	Smithter, Patricia	Posted	08/06/2018	$19.15	0/0%	$0.00	$19.15				
132-100855	08/06/2018	Smithward, Sally	Smith, Hilda	Posted	08/06/2018						matte paper	matte paper	3.83
132-100857	08/06/2018	Smithton, Ally	Smithee, Justin	Posted	08/06/2018	$20.00	0/0%	$0.00	$20.00				
132-100857	08/06/2018	Smithter, Trevor	Smith, Katherine	Posted	08/06/2018						matte paper	matte paper	4
132-100858	08/06/2018	Smith, Sam	Smithaw, Shelby	Posted	08/06/2018	$79.10	0/0%	$0.00	$79.10				
132-100858	08/06/2018	Smith, Sam	Smithter, Patricia	Posted	08/06/2018						Artwork	Artwork	3.5
132-100859	08/06/2018	Smithsan, Kelly	Smithix, Abigail	Posted	08/06/2018	$20.00	0/0%	$0.00	$20.00				
132-100859	08/06/2018	Smitharino,, Zegfried	Smithele, Betty	Posted	08/06/2018						matte paper	matte paper	4
132-100860	08/06/2018	Smithew, Lori	Smith, Jack	Posted	08/06/2018	$24.00	0/0%	$0.00	$24.00				
132-100860	08/06/2018	Smithile, Alice	Smithope, Fred	Posted	08/06/2018						Luster paper	Luster paper	3
132-100861	08/06/2018	Smith, Sam	Smithter, Patricia	Posted	08/06/2018	$33.90	0/0%	$0.00	$33.90				
132-100861	08/06/2018	Smithew, Lori	Smithinger, Julie	Posted	08/06/2018						Artwork	Artwork	1.5
132-101348	08/11/2018	Smithinton, Laura	Guest User			$2.20	0/0%	$0.00	$2.20				
132-101348	08/11/2018	Smithsan, Kelly	Smithix, Abigail								Glossy inkjet print	Glossy inkjet print	1
132-101546	08/16/2018	Smitherines, Greg	Smithipul, Mike	Revision Required		$54.00	0/0%	$0.00	$54.00				
132-101546	08/16/2018	Smithip, Sigfried	Smithee, Justin	Revision Required							Fabric	Fabric	3

Show 10 entries Showing 241 to 248 of 248 entries

Infoporte | Version: 7.1.1 | © 2018 The University of North Carolina at Chapel Hill


INFOPORTE
Home
Inbox
Finance
Legacy Accounts
HR
Legacy HR
Faculty
Legacy Faculty
Student
Tools
Cores
Settings
Purchase
Manage Cores
Utilities
Cores Contacts
Active Items
Inactive Items
Discounts
Sales
Edit Core Details
NIH Report
Custom Email
Core Import
Search
Clear
< Order Info
First
Previous
21
22
23
24
25
Next
Last

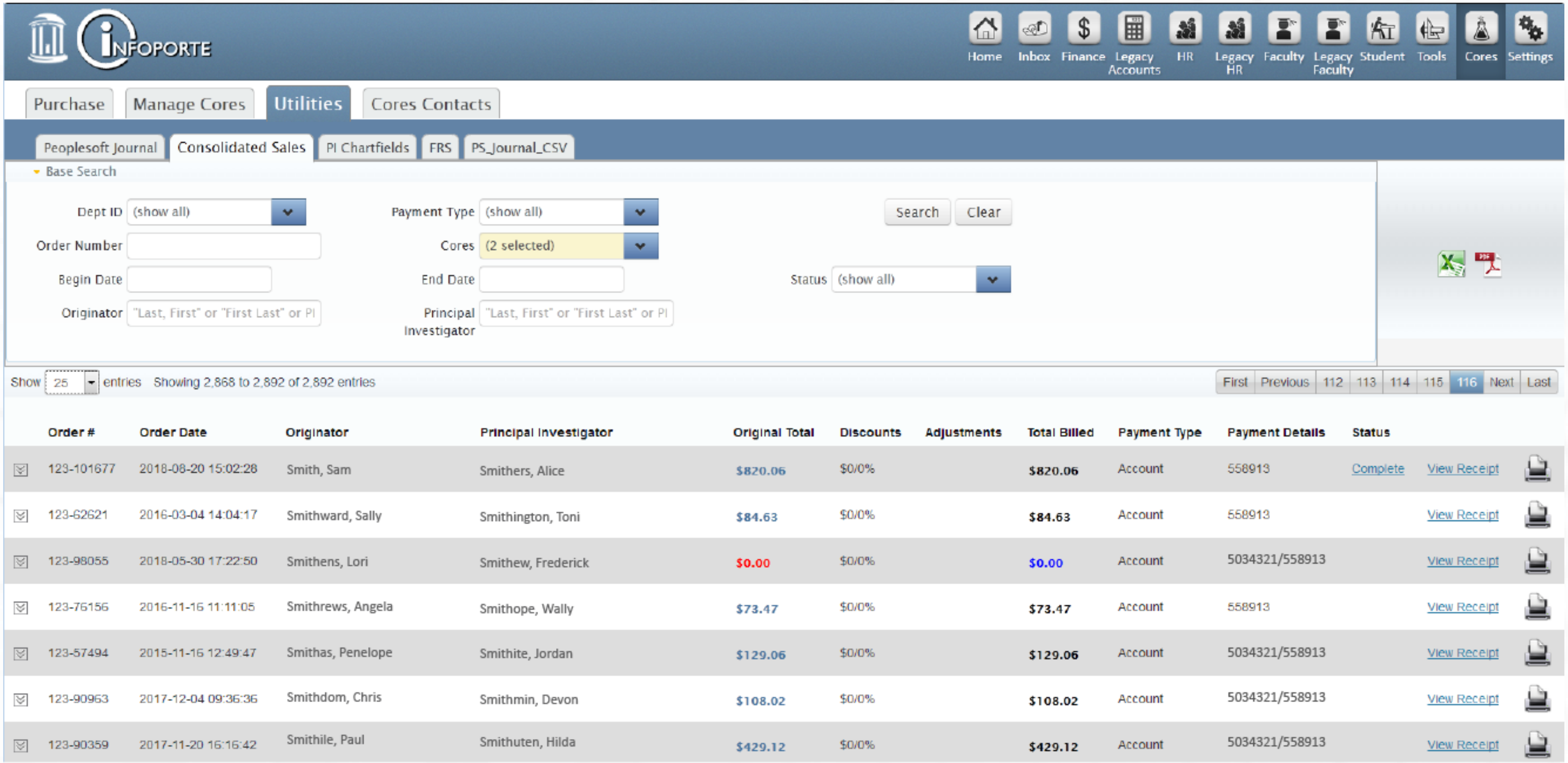
Cores: Biology Illustration and I

Show 10 entries Showing 241 to 248 of 248 entries

Order #	Payment Type	Payment Details	Account	Account Description	PI PID	PI Name	Agency	Award	Major Award Agency	Continuation Account
132-100855	Account	5551234/ 321987	A17-9876	Causes and consequences of climate-driven phenological	765432101	Smith, Sam	National Science Foundation (NSF)	EF-9876432		
132-100855										
132-100857	Account	5551234/ 321987	A17-9876	The role of the FEI pathway in regulating cell	765432102	Smithward, Sally	National Science Foundation (NSF)	IOS-9876432		
132-100857										
132-100858	Account	5551234/ 321987	A17-9876	TRI-INSTITUTIONAL TB RESEARCH UNIT: PERSISTENCE	765432103	Smithton, Ally	Cornell University Medical Campus	9876543-N2	Cornell University	
132-100858										
132-100859	Account	5551234/ 321987	A17-9876	Histone mRA1 Regulation in Development	765432104	Smithter, Trevor	NIH National Institute of General Medica	5-ROI-GM921	National Institutes of Health (NIH)	
132-100859										
132-100860	Account	5551234/ 321987	A17-9876	The transparent soil microcosm: a window into the spatia	765432105	Smith, Sam	Department of Energy (DOE)	DE-SC00987		
132-100860										
132-100861	Account	321987	537210		765432106	Smitheriner, Roger				
132-100861										
132-101348	Credit Card									
132-101348										
132-101546	Account	5551234/ 321987	A17-9876	The role of the FEI pathway in regulating cell wall	765432107	Smithsan, Kelly	National Science Foundation (NSF)	IOS-1234567		
132-101546										

Making the connections

Cores Consolidated Report

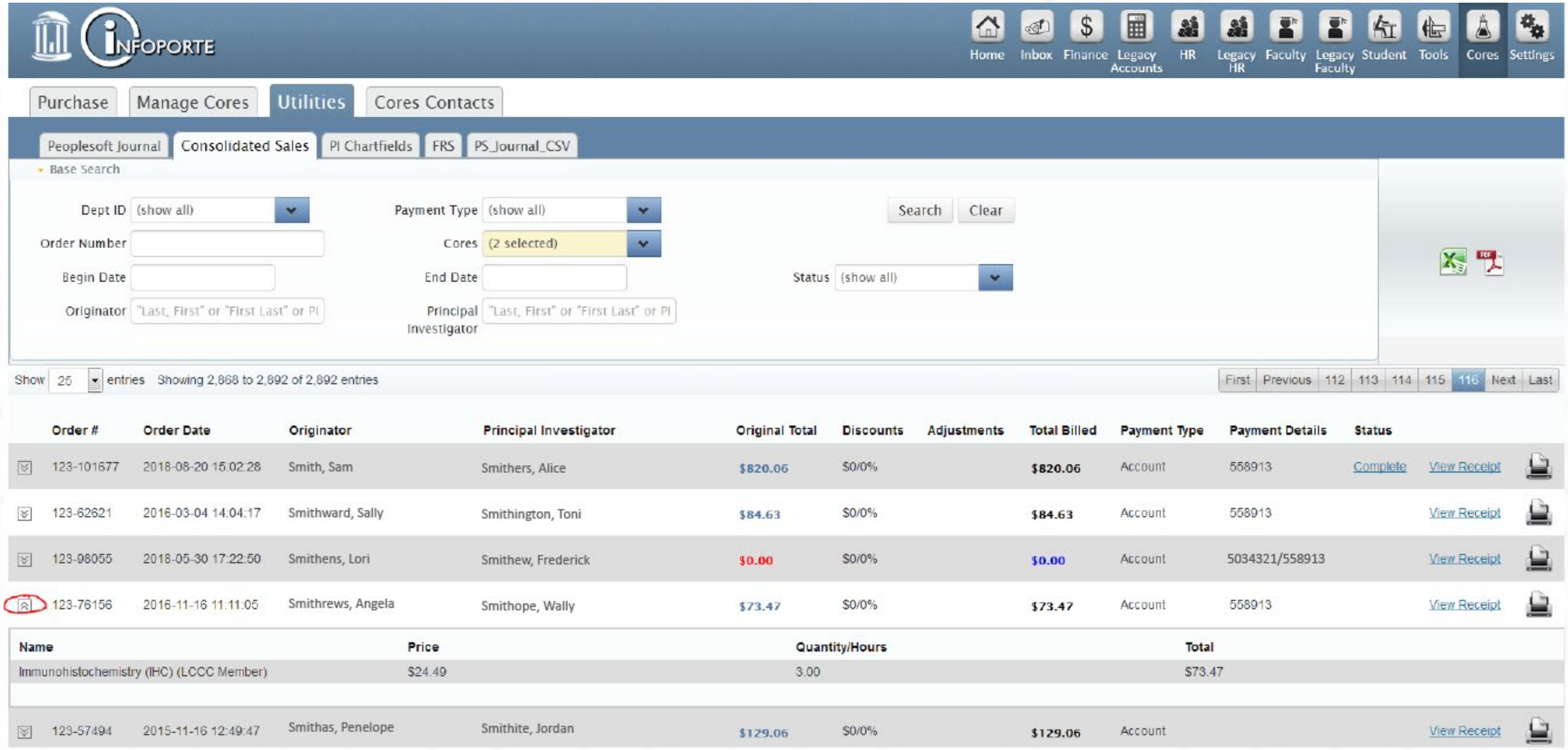

INFOPORTE
Home
Inbox
Finance
Legacy Accounts
HR
Legacy HR
Faculty
Legacy Faculty
Student
Tools
Cores
Settings
Purchase
Manage Cores
Utilities
Cores Contacts
Peoplesoft Journal
Consolidated Sales
PI Chartfields
FRS
PS_Journal_CSV
Base Search
Search
Clear
First
Previous
112
113
114
115
116
Next
Last

Dept ID: (show all)
Payment Type: (show all)
Order Number:
Cores: (2 selected)
Begin Date:
End Date:
Status: (show all)
Originator: "Last, First" or "First Last" or PI
Principal Investigator: "Last, First" or "First Last" or PI

Show 25 entries Showing 2,868 to 2,892 of 2,892 entries

Order #	Order Date	Originator	Principal Investigator	Original Total	Discounts	Adjustments	Total Billed	Payment Type	Payment Details	Status		
123-101677	2018-08-20 15:02:28	Smith, Sam	Smithers, Alice	$820.06	$0/0%		$820.06	Account	558913	Complete	View Receipt	🖶
123-62621	2016-03-04 14:04:17	Smithward, Sally	Smithington, Toni	$84.63	$0/0%		$84.63	Account	558913		View Receipt	🖶
123-98055	2018-05-30 17:22:50	Smithens, Lori	Smithew, Frederick	$0.00	$0/0%		$0.00	Account	5034321/558913		View Receipt	🖶
123-76156	2016-11-16 11:11:05	Smithrews, Angela	Smithope, Wally	$73.47	$0/0%		$73.47	Account	558913		View Receipt	🖶
123-57494	2015-11-16 12:49:47	Smithas, Penelope	Smithite, Jordan	$129.06	$0/0%		$129.06	Account	5034321/558913		View Receipt	🖶
123-90963	2017-12-04 09:36:36	Smithdom, Chris	Smithmin, Devon	$108.02	$0/0%		$108.02	Account	5034321/558913		View Receipt	🖶
123-90359	2017-11-20 16:16:42	Smithile, Paul	Smithuten, Hilda	$429.12	$0/0%		$429.12	Account	5034321/558913		View Receipt	🖶

Cores Consolidated - Expanded


INFOPORTE
Home
Inbox
Finance
Legacy Accounts
HR
Legacy HR
Faculty
Legacy Faculty
Student
Tools
Cores
Settings
Purchase
Manage Cores
Utilities
Cores Contacts
Peoplesoft Journal
Consolidated Sales
PI Chartfields
FRS
PS_Journal_CSV
Base Search
Search
Clear
First
Previous
112
113
114
115
116
Next
Last

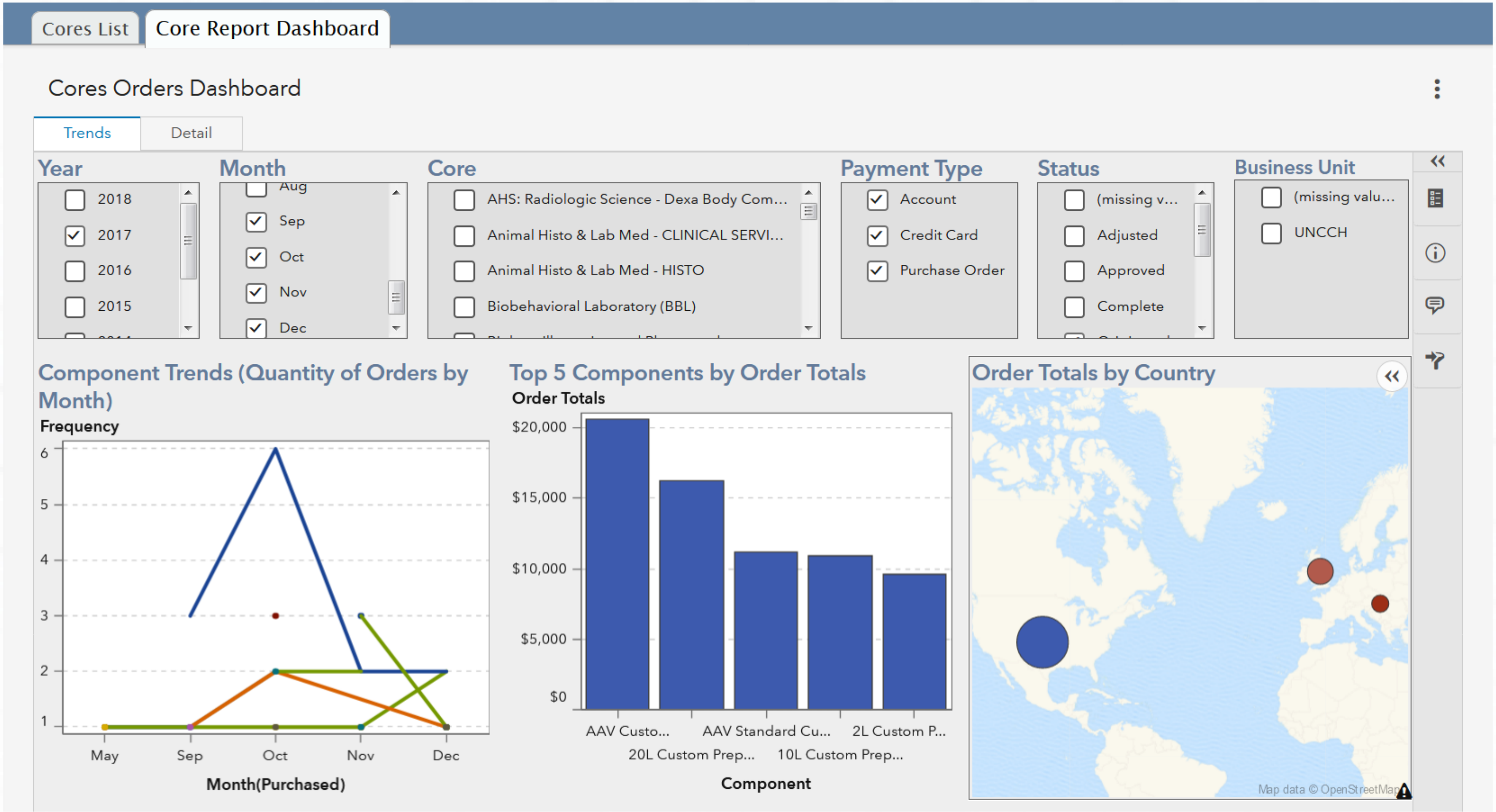
Dept ID: (show all)
Order Number:
Begin Date:
Originator: "Last, First" or "First Last" or PI
Payment Type: (show all)
Cores: (2 selected)
End Date:
Principal Investigator: "Last, First" or "First Last" or PI
Status: (show all)

Show 25 entries Showing 2,868 to 2,892 of 2,892 entries

Order #	Order Date	Originator	Principal Investigator	Original Total	Discounts	Adjustments	Total Billed	Payment Type	Payment Details	Status	
123-101677	2018-08-20 15:02:28	Smith, Sam	Smithers, Alice	$820.06	$0/0%		$820.06	Account	558913	Complete	View Receipt
123-62621	2016-03-04 14:04:17	Smithward, Sally	Smithington, Toni	$84.63	$0/0%		$84.63	Account	558913		View Receipt
123-98055	2018-05-30 17:22:50	Smithens, Lori	Smithew, Frederick	$0.00	$0/0%		$0.00	Account	5034321/558913		View Receipt
123-76156	2016-11-16 11:11:05	Smithrews, Angela	Smithope, Wally	$73.47	$0/0%		$73.47	Account	558913		View Receipt
123-57494	2015-11-16 12:49:47	Smithas, Penelope	Smithite, Jordan	$129.06	$0/0%		$129.06	Account			View Receipt

Name	Price	Quantity/Hours	Total
Immunohistochemistry (IHC) (LCCC Member)	$24.49	3.00	$73.47

Recharge/Core Report Dashboard



Cores List | Core Report Dashboard

Cores Orders Dashboard

Trends | Detail

Year
- ☐ 2018
- ☑ 2017
- ☐ 2016
- ☐ 2015

Month
- ☐ Aug
- ☑ Sep
- ☑ Oct
- ☑ Nov
- ☑ Dec

Core
- ☐ AHS: Radiologic Science - Dexa Body Com...
- ☐ Animal Histo & Lab Med - CLINICAL SERVI...
- ☐ Animal Histo & Lab Med - HISTO
- ☐ Biobehavioral Laboratory (BBL)

Payment Type
- ☑ Account
- ☑ Credit Card
- ☑ Purchase Order

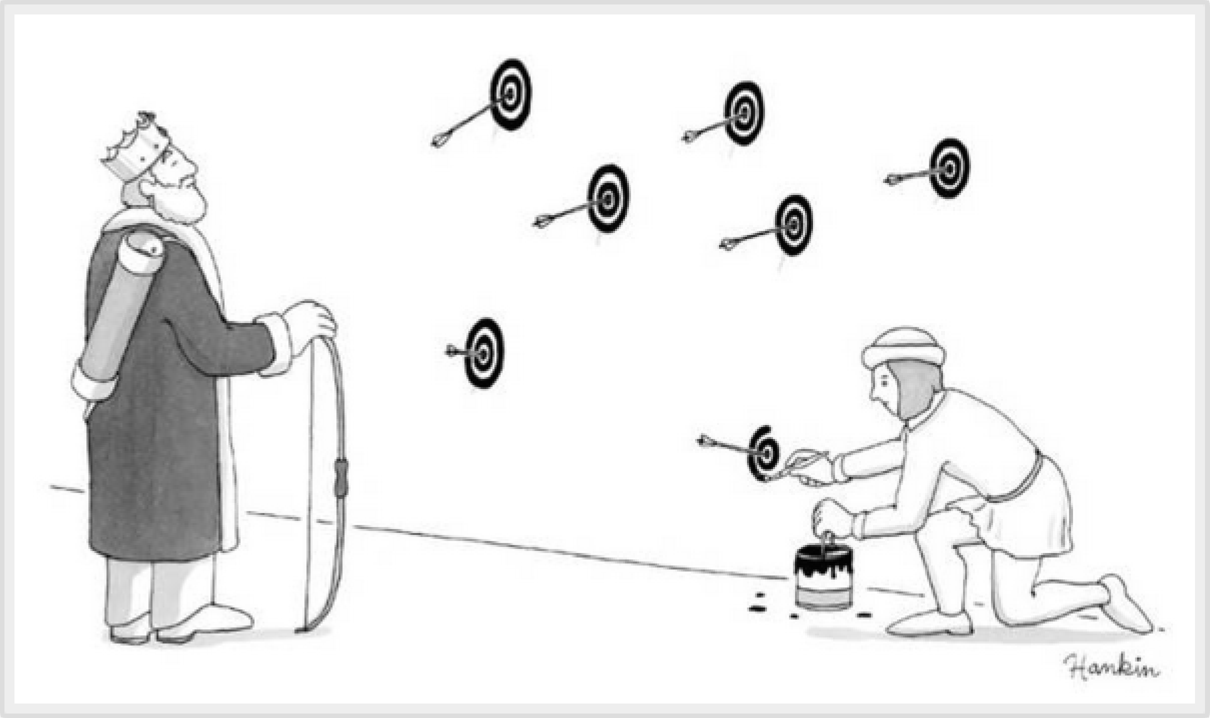
Status
- ☐ (missing v...
- ☐ Adjusted
- ☐ Approved
- ☐ Complete

Business Unit
- ☐ (missing valu...
- ☐ UNCCH

Component Trends (Quantity of Orders by Month)
Frequency
6
5
4
3
2
1
May
Sep
Oct
Nov
Dec
Month(Purchased)
Top 5 Components by Order Totals
Order Totals
$20,000
$15,000
$10,000
$5,000
$0
AAV Custo...
AAV Standard Cu...
2L Custom P...
20L Custom Prep...
10L Custom Prep...
Component
Order Totals by Country
Map data © OpenStreetMap

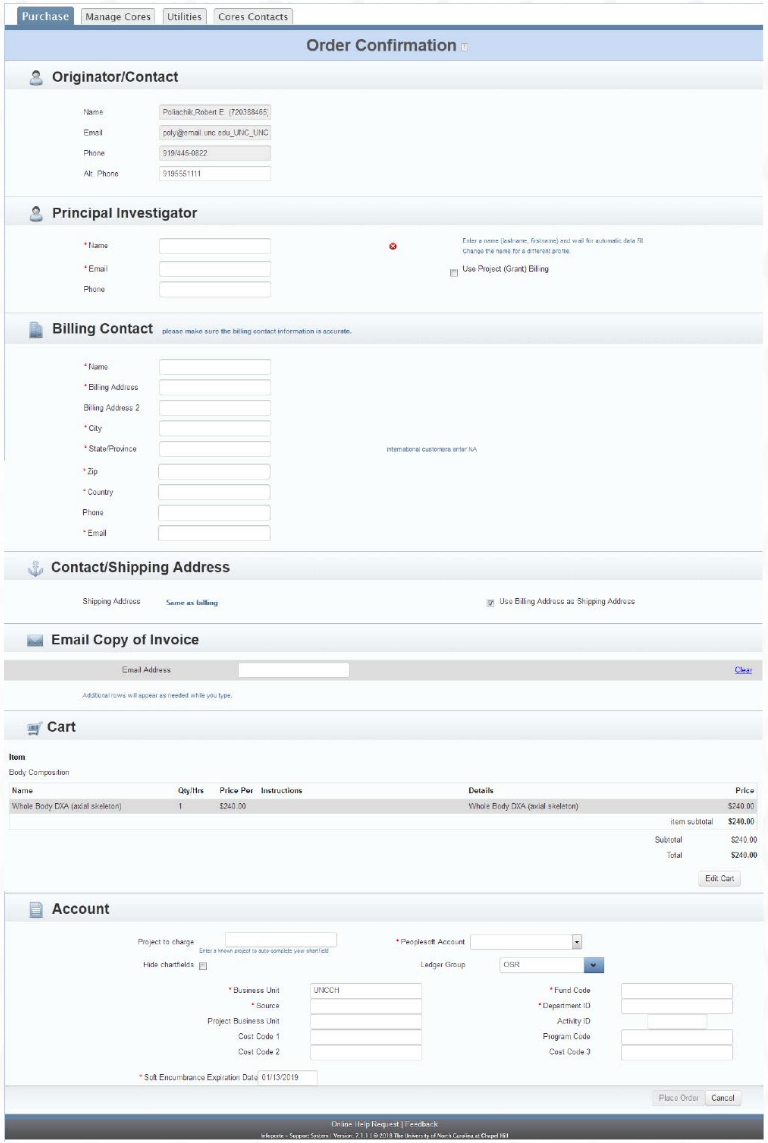
Cores: 5+ Easy Ways To Order

- Goal: Every try is a bullseye



Recharge Order Form

- It's Complicated



Order Confirmation

Originator/Contact

Name: Poliachik,Robert E. (720388465)
Email: poly@email.unc.edu_UNC_UNC
Phone: 919/445-0822
Alt. Phone: 9195551111

Principal Investigator

* Name:
* Email:
Phone:

Enter a name (lastname, firstname) and wait for automatic data fill.
Change the name for a different profile.

☐ Use Project (Grant) Billing

Billing Contact

please make sure the billing contact information is accurate.

* Name:
* Billing Address:
Billing Address 2:
* City:
* State/Province: (International customers enter NA)
* Zip:
* Country:
Phone:
* Email:

Contact/Shipping Address

Shipping Address: Same as billing

☑ Use Billing Address as Shipping Address

Email Copy of Invoice

Email Address:

Additional rows will appear as needed while you type.

Cart

Item

Body Composition

Name	Qty/Hrs	Price Per	Instructions	Details	Price
Whole Body DXA (axial skeleton)	1	$240.00		Whole Body DXA (axial skeleton)	$240.00
				item subtotal	**$240.00**

Subtotal $240.00
Total **$240.00**

Account

Project to charge: (Enter a known project to auto-complete your chartfield)
* Peoplesoft Account:
Hide chartfields ☐
Ledger Group: OSR

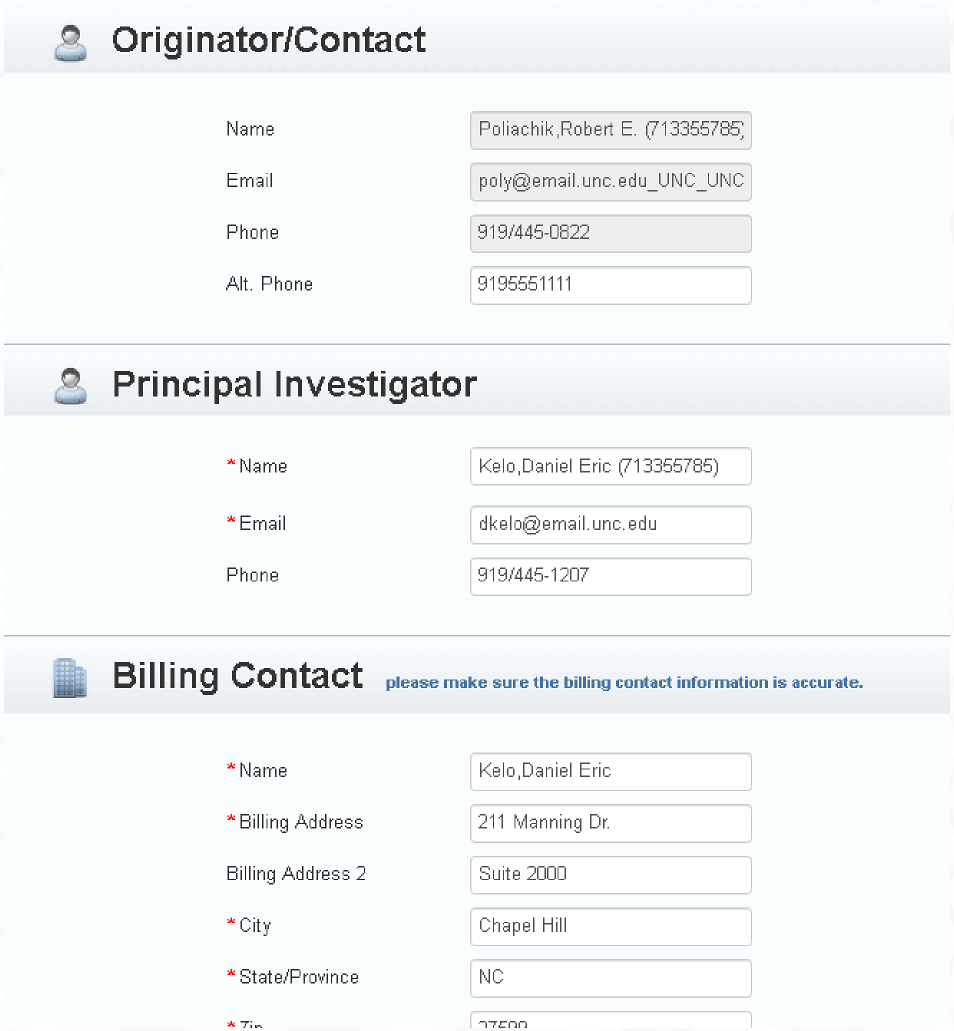
* Business Unit: UNCCH
* Source:
Project Business Unit:
Cost Code 1:
Cost Code 2:
* Fund Code:
* Department ID:
Activity ID:
Program Code:
Cost Code 3:

* Soft Encumbrance Expiration Date: 01/13/2019

Infoporte – Support System | Version: 7.1.1 | © 2018 The University of North Carolina at Chapel Hill

PI Information Autofill

- Enter PI
- Data Autofills



Originator/Contact

Name	Poliachik,Robert E. (713355785)
Email	poly@email.unc.edu_UNC_UNC
Phone	919/445-0822
Alt. Phone	9195551111

Principal Investigator

* Name	Kelo,Daniel Eric (713355785)
* Email	dkelo@email.unc.edu
Phone	919/445-1207

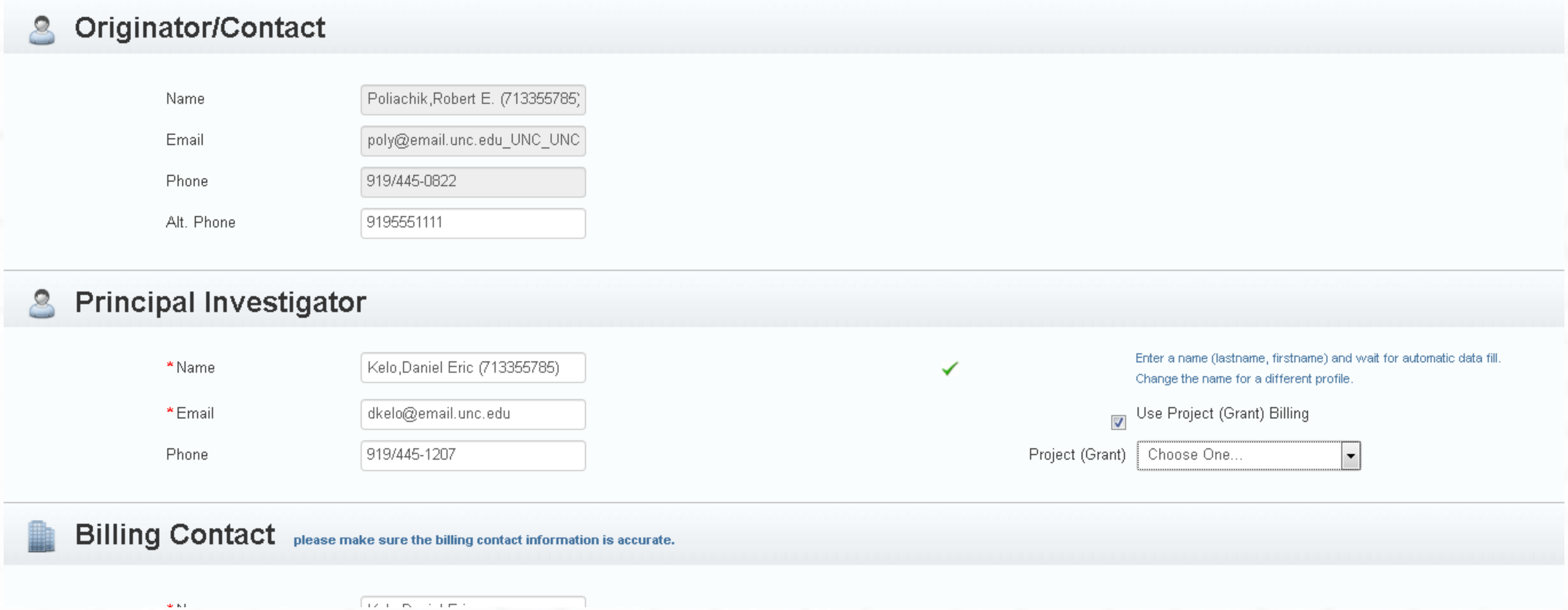
Billing Contact

please make sure the billing contact information is accurate.

* Name	Kelo,Daniel Eric
* Billing Address	211 Manning Dr.
Billing Address 2	Suite 2000
* City	Chapel Hill
* State/Province	NC
* Zip	27599

Cores: PI Grant Autofill

- Enter PI
- Select Project (Grant)
- Data Autofills



Originator/Contact

Name	Poliachik,Robert E. (713355785)
Email	poly@email.unc.edu_UNC_UNC
Phone	919/445-0822
Alt. Phone	9195551111

Principal Investigator

* Name	Kelo,Daniel Eric (713355785) ✓
* Email	dkelo@email.unc.edu
Phone	919/445-1207

Enter a name (lastname, firstname) and wait for automatic data fill.
Change the name for a different profile.

☑ Use Project (Grant) Billing

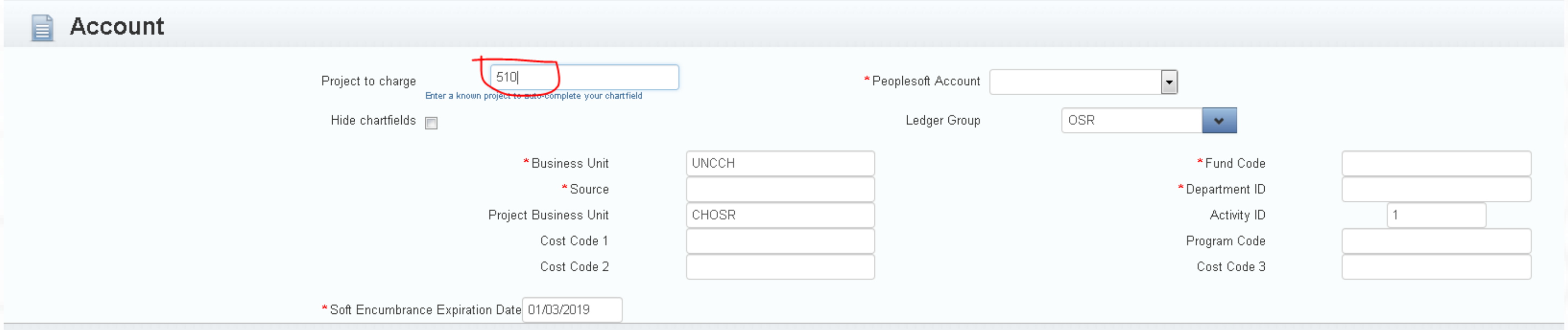
Project (Grant): Choose One...

Billing Contact

please make sure the billing contact information is accurate.

Chartfield Autofill for ProjectID

- Enter ProjectID
- Rest of Chartfield Autofills

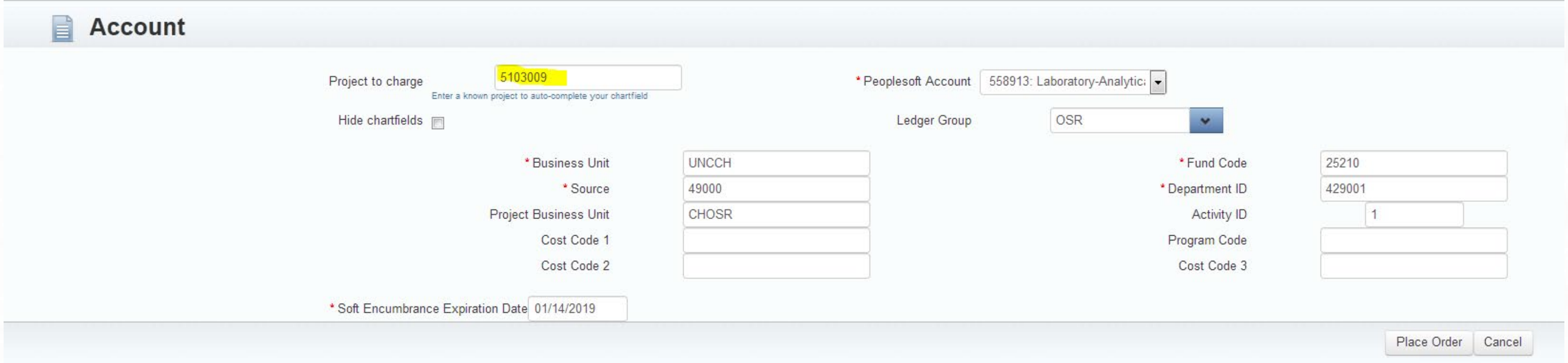


Account

Project to charge: 510
Enter a known project to auto-complete your chartfield
*Peoplesoft Account:
Hide chartfields ☐
Ledger Group: OSR

*Business Unit	UNCCH	*Fund Code	
*Source		*Department ID	
Project Business Unit	CHOSR	Activity ID	1
Cost Code 1		Program Code	
Cost Code 2		Cost Code 3	

*Soft Encumbrance Expiration Date: 01/03/2019



Account

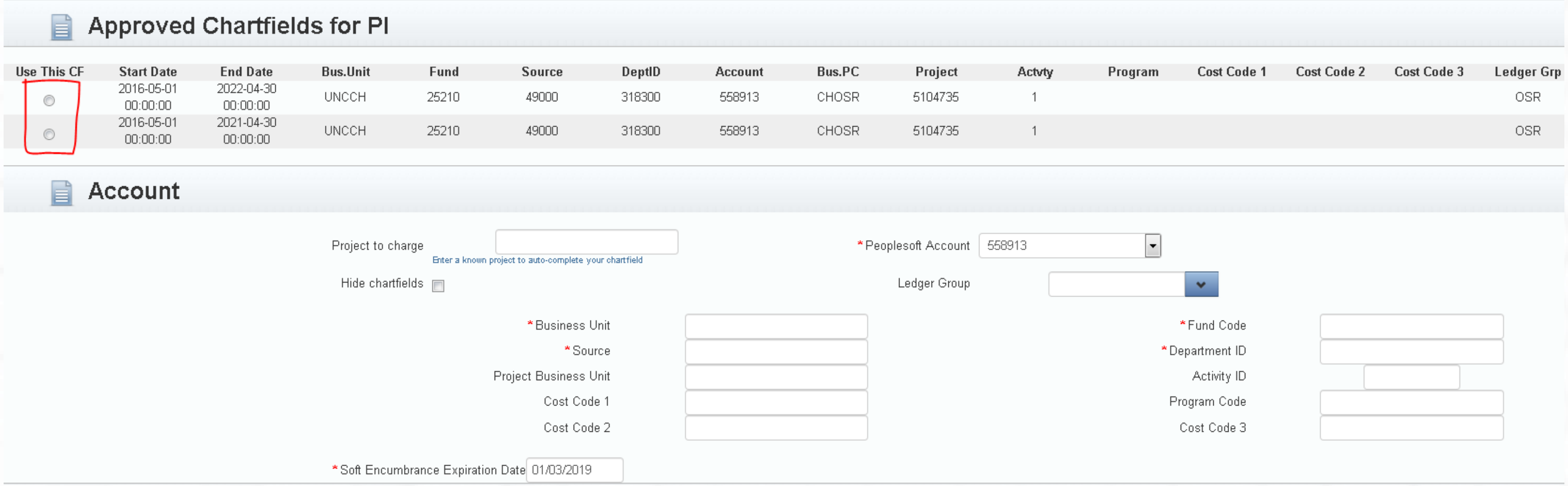
Project to charge: 5103009
Enter a known project to auto-complete your chartfield
*Peoplesoft Account: 558913: Laboratory-Analytic:
Hide chartfields ☐
Ledger Group: OSR

*Business Unit	UNCCH	*Fund Code	25210
*Source	49000	*Department ID	429001
Project Business Unit	CHOSR	Activity ID	1
Cost Code 1		Program Code	
Cost Code 2		Cost Code 3	

*Soft Encumbrance Expiration Date: 01/14/2019

Cores: PI Chartfields

- If PI Chartfields are Defined
- You just select the one you want to use



Approved Chartfields for PI

Use This CF	Start Date	End Date	Bus.Unit	Fund	Source	DeptID	Account	Bus.PC	Project	Actvty	Program	Cost Code 1	Cost Code 2	Cost Code 3	Ledger Grp
○	2016-05-01 00:00:00	2022-04-30 00:00:00	UNCCH	25210	49000	318300	558913	CHOSR	5104735	1					OSR
○	2016-05-01 00:00:00	2021-04-30 00:00:00	UNCCH	25210	49000	318300	558913	CHOSR	5104735	1					OSR

Account

Project to charge

Enter a known project to auto-complete your chartfield

*Peoplesoft Account 558913

Hide chartfields ☐

Ledger Group

*Business Unit

*Fund Code

*Source

*Department ID

Project Business Unit

Activity ID

Cost Code 1

Program Code

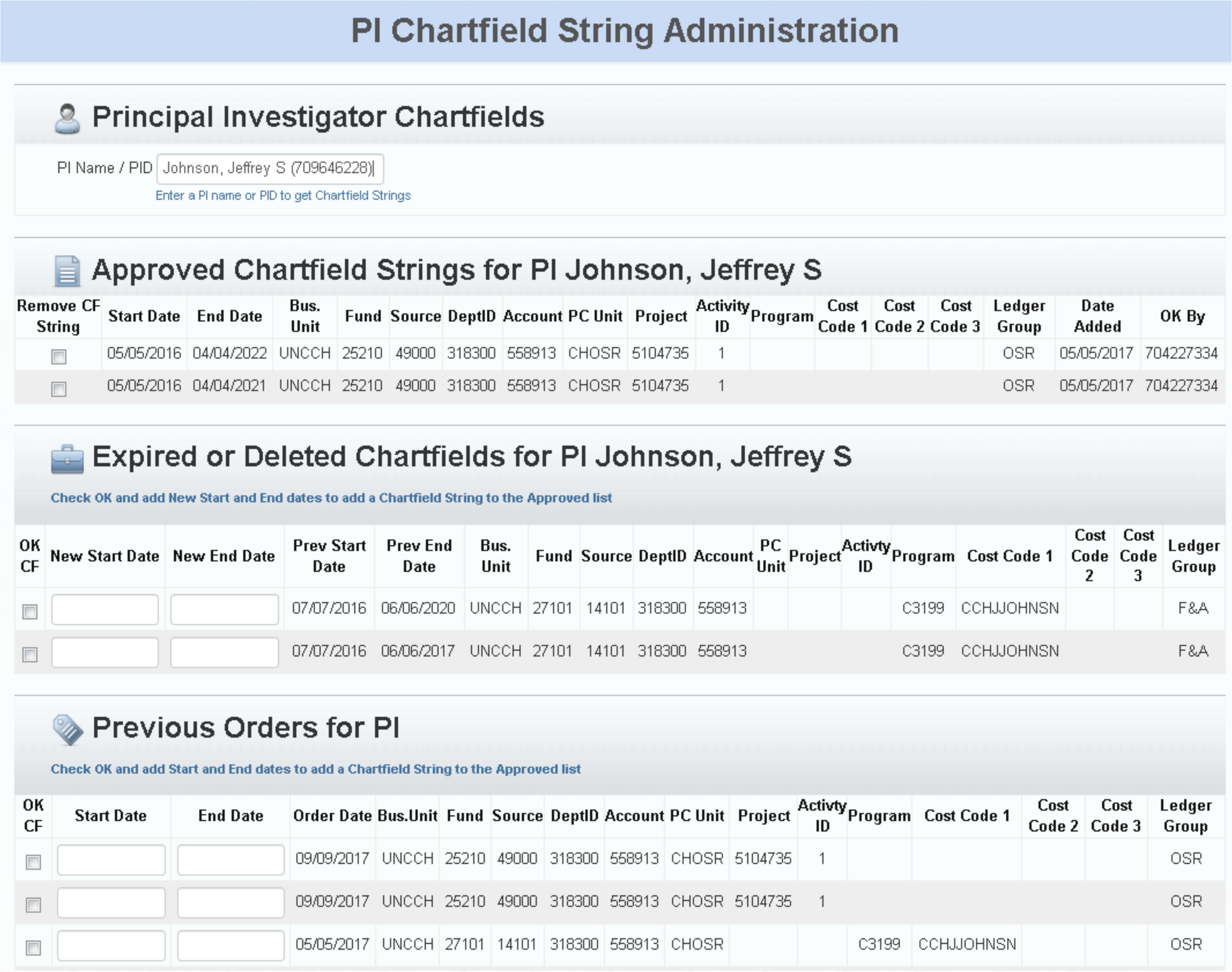
Cost Code 2

Cost Code 3

*Soft Encumbrance Expiration Date 01/03/2019

Core PI Chartfield Admin

- Dept Accountant determines valid chartfields for a PI



PI Chartfield String Administration

Principal Investigator Chartfields

PI Name / PID: Johnson, Jeffrey S (709646228)

Enter a PI name or PID to get Chartfield Strings

Approved Chartfield Strings for PI Johnson, Jeffrey S

Remove CF String	Start Date	End Date	Bus. Unit	Fund	Source	DeptID	Account	PC Unit	Project	Activity ID	Program	Cost Code 1	Cost Code 2	Cost Code 3	Ledger Group	Date Added	OK By
☐	05/05/2016	04/04/2022	UNCCH	25210	49000	318300	558913	CHOSR	5104735	1					OSR	05/05/2017	704227334
☐	05/05/2016	04/04/2021	UNCCH	25210	49000	318300	558913	CHOSR	5104735	1					OSR	05/05/2017	704227334

Expired or Deleted Chartfields for PI Johnson, Jeffrey S

Check OK and add New Start and End dates to add a Chartfield String to the Approved list

OK CF	New Start Date	New End Date	Prev Start Date	Prev End Date	Bus. Unit	Fund	Source	DeptID	Account	PC Unit	Project	Activty ID	Program	Cost Code 1	Cost Code 2	Cost Code 3	Ledger Group
☐			07/07/2016	06/06/2020	UNCCH	27101	14101	318300	558913				C3199	CCHJJOHNSN			F&A
☐			07/07/2016	06/06/2017	UNCCH	27101	14101	318300	558913				C3199	CCHJJOHNSN			F&A

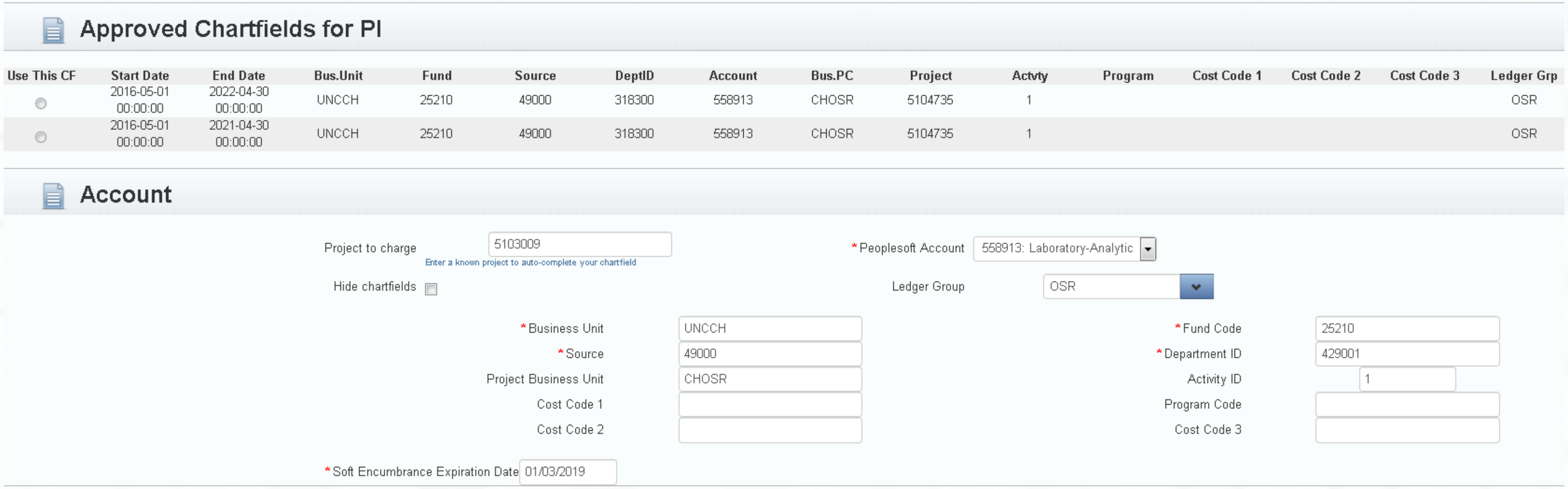
Previous Orders for PI

Check OK and add Start and End dates to add a Chartfield String to the Approved list

OK CF	Start Date	End Date	Order Date	Bus.Unit	Fund	Source	DeptID	Account	PC Unit	Project	Activty ID	Program	Cost Code 1	Cost Code 2	Cost Code 3	Ledger Group
☐			09/09/2017	UNCCH	25210	49000	318300	558913	CHOSR	5104735	1					OSR
☐			09/09/2017	UNCCH	25210	49000	318300	558913	CHOSR	5104735	1					OSR
☐			05/05/2017	UNCCH	27101	14101	318300	558913	CHOSR			C3199	CCHJJOHNSN			OSR

2^{nd} Order Autopopulate

- If you are placing multiple orders
- The second order's checkout page retains the same info from the first order.



Approved Chartfields for PI

Use This CF	Start Date	End Date	Bus.Unit	Fund	Source	DeptID	Account	Bus.PC	Project	Actvty	Program	Cost Code 1	Cost Code 2	Cost Code 3	Ledger Grp
○	2016-05-01 00:00:00	2022-04-30 00:00:00	UNCCH	25210	49000	318300	558913	CHOSR	5104735	1					OSR
○	2016-05-01 00:00:00	2021-04-30 00:00:00	UNCCH	25210	49000	318300	558913	CHOSR	5104735	1					OSR

Account

Project to charge: 5103009

Enter a known project to auto-complete your chartfield

*Peoplesoft Account: 558913: Laboratory-Analytic

Hide chartfields ☐

Ledger Group: OSR

*Business Unit: UNCCH

*Source: 49000

Project Business Unit: CHOSR

Cost Code 1:

Cost Code 2:

*Fund Code: 25210

*Department ID: 429001

Activity ID: 1

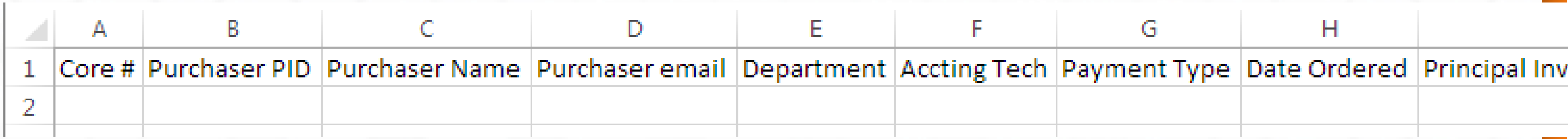
Program Code:

Cost Code 3:

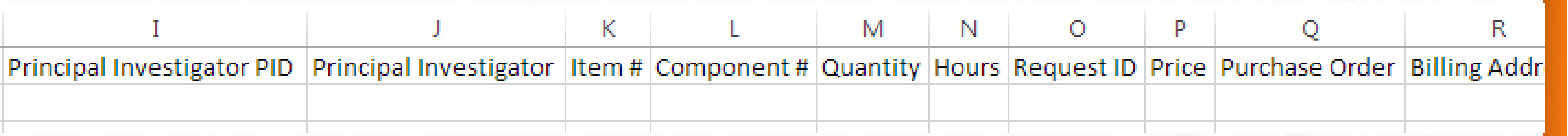
*Soft Encumbrance Expiration Date: 01/03/2019

Core Orders Import

- CSV File Import
- Uses a specific Infoporte Cores file format
- Don’t have to use the UI
- Quicker but trickier
- You have to be granted Core Import Access

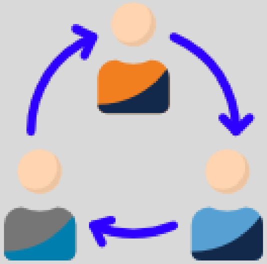


	A	B	C	D	E	F	G	H	
1	Core #	Purchaser PID	Purchaser Name	Purchaser email	Department	Accting Tech	Payment Type	Date Ordered	Principal Inv
2									



I	J	K	L	M	N	O	P	Q	R
Principal Investigator PID	Principal Investigator	Item #	Component #	Quantity	Hours	Request ID	Price	Purchase Order	Billing Addr

Questions?



Thank You for Your Participation!