



# ConnectCarolina 2018 User Conference

## Tips and Tricks for InfoPorte

*Presenter: Sally Lakomiak and Keith Jones*



Making the connections

# Welcome





## Introduction of Presenters



Keith Jones

Sally Lakomiak





## Agenda

- Overview of InfoPorte
- How do I get to InfoPorte?
- Review Tips and Tricks for using and navigating through InfoPorte
- Final Questions



## Overview of InfoPorte

InfoPorte is a web-based application

- Access and store information
- Complete daily administrative tasks
- Source for all reporting within ConnectCarolina
- Data from ConnectCarolina to InfoPorte is always one way. It never flows back to ConnectCarolina.
- Data from ConnectCarolina is downloaded each night to the Data Warehouse for InfoPorte.
- InfoPorte is one day behind ConnectCarolina.



## How do I get to InfoPorte?

### Logging In

You can access InfoPorte in two ways:

1. Go directly to InfoPorte:  
[infoporte.unc.edu](http://infoporte.unc.edu)
2. From ConnectCarolina,  
click Enterprise Reporting on the left

### Note:

InfoPorte works best with  
Mozilla Firefox.





## Accepting Terms of Use

Before you can begin using InfoPorte, you need to Accept the Terms of Use. The Terms of Use Policy can be found via a link on the InfoPorte log in page.

**InfoPORTE**

Home Find Order or Request

**Login**

**New to Infoporte?**

Regardless of which reports that you are requesting access to, you need to agree to the [Terms of Use Policy](#) in ConnectCarolina before being granted access to InfoPorte Reporting. You can find the Terms of Use Policy by logging in to ConnectCarolina at [connectcarolina.unc.edu](http://connectcarolina.unc.edu). (You only need to have the basic access that all faculty and staff have to get to this page, and you get this access automatically.) Once you have logged in, click the **Self Service** button and then the **Terms of Use Policy**. After you review the policy, check the box to certify that you have read and agree to the Terms of Use and then click the **Confirm** button.

*If you've accepted the Terms of Use Agreement and are still not able to log in, call 962-HELP and choose option 4.*

**Resources**

- [Get training for Infoporte.](#) Find reference guides, student materials, and online training at the CCinfo site
- [Need system access?](#) Learn how new users request access.
- [What's new?](#) Learn about enhancements and other new features in Infoporte.





## Accepting Terms of Use

**Connect CAROLINA**

Favorites ▾ Main Menu ▾

**SelfService**

- TIM
- View Paycheck
- Enroll or Change Benefits
- View W-2/W-2c Forms
- W-4 and NC4 Tax Information
- Payroll Forms
- Update Personal Information
- Emergency Contacts
- Performance Documents
- Self-Identify Veteran Status
- Self-Identify Race/Ethnicity
- Self-Identify Disability
- Training Enrollment
- Cancel Course Enrollment
- Training Summary
- Terms of Use Policy**
- Software Acquisition
- Vendor Catalog / ePro

**Student Administration**

**Finance**

Log into ConnectCarolina using your onyen and password and select the Terms of Use Policy link under SelfService.

Check the box and click confirm. You can now log into InfoPorte.

### Terms of Use Policy

Please review the Faculty, Staff and Affiliate Terms of use for University Administrative Systems Policy below.

This Policy applies to faculty, staff and authorized affiliates who are users of the University's Administrative Systems.

#### Terms of use for University Administrative Systems Policy

Click the check box below and the confirm button once you have read and agree to the terms stated in the policy.

☒ I certify that I have read and agree to the Terms of use for University Administrative Systems Policy and that it is my responsibility to be aware of and adhere to any changes to this policy in the future.

Confirm





## Use the Right Browser

We recommend you use Chrome or Firefox when working in InfoPorte. InfoPorte runs faster and more reliably in these browser than with Internet Explorer.

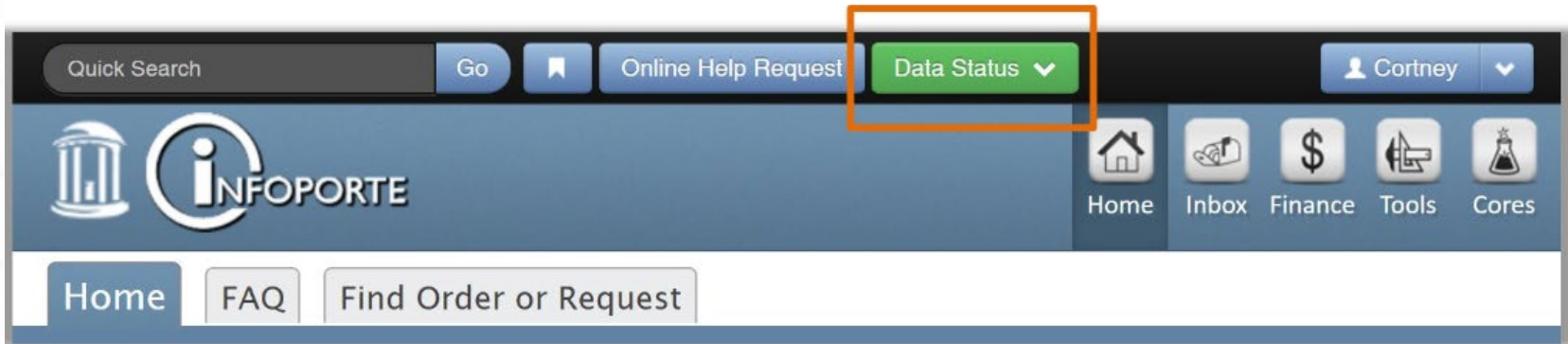
No matter which browser you use, remember to periodically clear your cache. The method for doing this varies by browser - - search online for instructions.





## InfoPorte Data

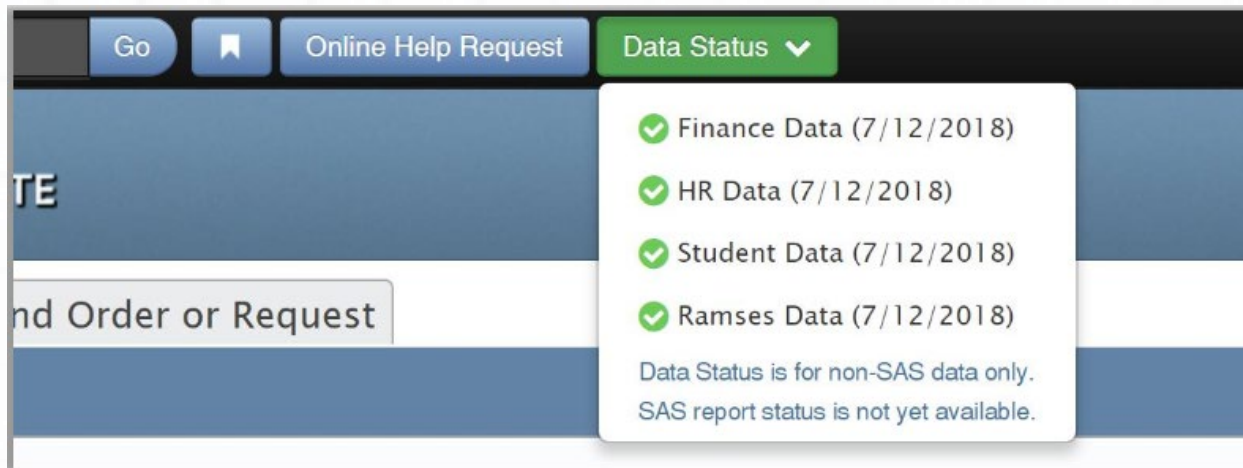
The Data Status Alert button is the main indicator for how up-to-date the data in InfoPorte is:





## InfoPorte Data: Data Status button

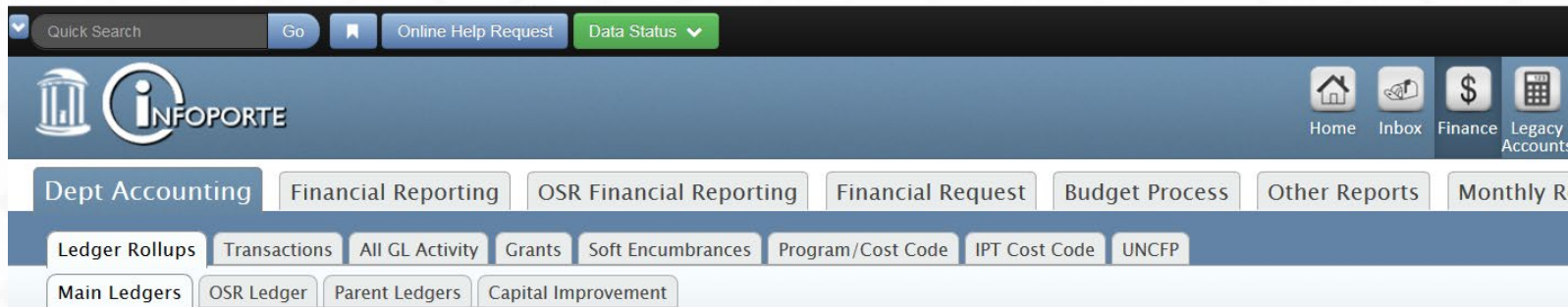
- If the Data Status button is green, all downloads completed successfully and the data in InfoPorte is one day behind ConnectCarolina, as expected.
- If the button is red, the downloads in one or more areas did not complete successfully.





## Increase or Decrease Display Size in a Browser

If you hold the Ctrl key and hit the + key, the display of the browser will increase.



If you hold the Ctrl key and hit the – key, the display of the browser will decrease.





## Open Another Browser Tab

Hold down the Ctrl key on your keyboard and click another tab, button or report within the current page.

One browser tab is open.

The screenshot displays the Infoporte web application interface. The browser tab is titled "Infoporte - Home" and the address bar shows the URL "https://infoporte.unc.edu/home/home\_dashboard.php". The interface includes a navigation bar with links to Home, Inbox, and Finance. Below this is a dashboard section with tabs for Dashboard, Home, School Info, School Reports, FAQ, and Find Order or Request. The main content area shows a table of project data with columns for Award, Total Award Amount, Project, PI Name, Project Description, Project Status, Sponsor ID - Name, Project Begin Date, Project End Date, Direct Budget, and Direct Expense. The table contains one row of data for project A17-1466.

Award	Total Award Amount	Project	PI Name	Project Description	Project Status	Sponsor ID - Name	Project Begin Date	Project End Date	Direct Budget	Direct Expense
A17-1466	0.00	<a href="#">4100557</a>	ADAMS Jr KIRKWOOD F	PROTOCOL: 20110203	Open	6081 - Amgen, Inc.	4/6/2017	10/5/2021	46,555.29	79,683.73



In this example, I held down the Ctrl key and clicked on the Finance button. The focus will remain on the current page. To change the focus to the newly opened tab, just click on it.

Two browser tabs are now open

The screenshot shows a web browser with two tabs open: 'Infoporte - Home' and 'Infoporte - Finance'. The 'Infoporte - Finance' tab is the active tab. The browser address bar shows the URL 'https://infoporte.unc.edu/home/home\_dashboard.php'. The page content includes a navigation bar with 'Home', 'Inbox', 'Finance', and 'Legacy Account' buttons. Below this is a 'Dashboard' section with a table of project information.

Award	Total Award Amount	Project	PI Name	Project Description	Project Status	Sponsor ID - Name	Project Begin Date	Project End Date	Direct Budget	Direct Expense




## Favorites

Use the Favorites button to save your common searches


### To add a Favorite:

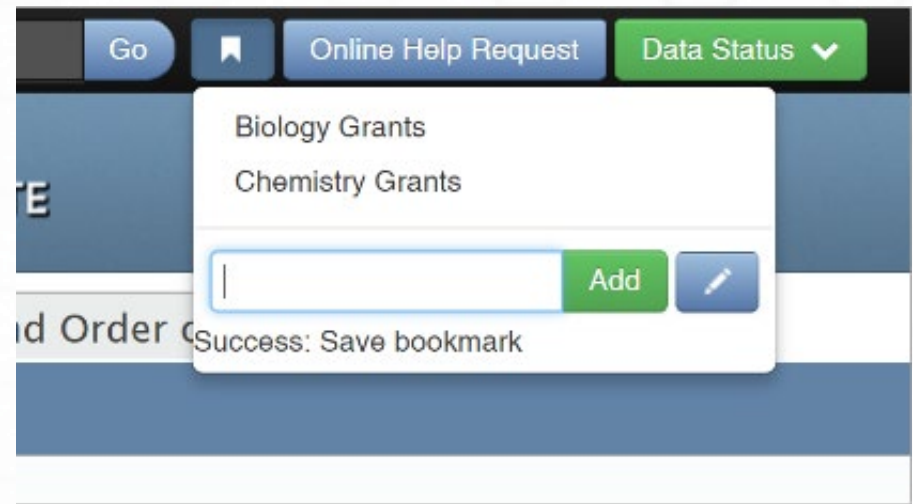
1. Click the Favorite button.
2. Name your Favorite.
3. Click Add

### To delete a Favorite:

1. Click the  icon.
2. Click the “x” by the Favorite you want to delete.

### **Note:**

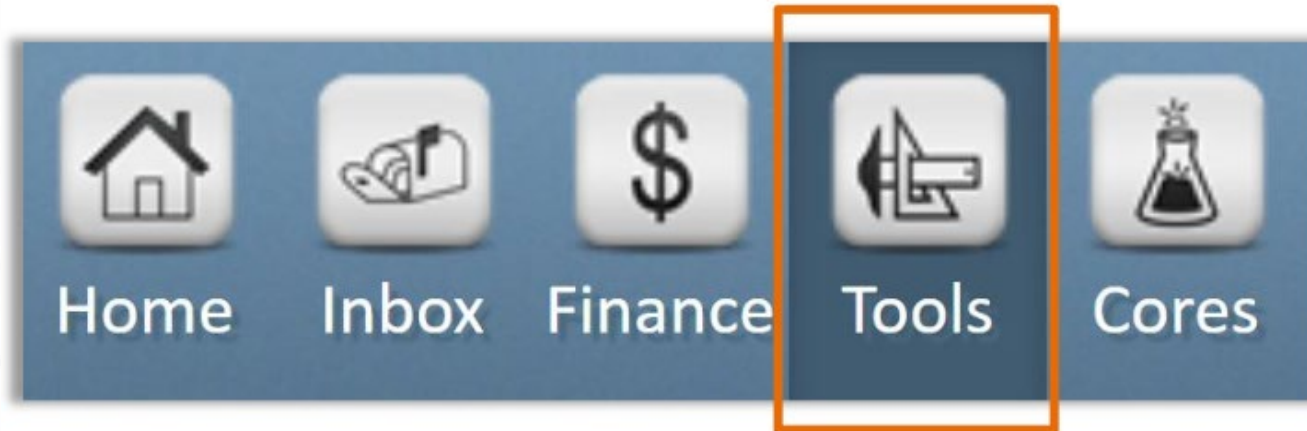
*You can't edit existing Favorites, but you can delete them using the  icon.*







## Looking Up Chartfields





## Looking Up Chartfields

Business References | Reservations

Data Dictionary List | Chartfield Lookup | Cost Codes | FRS Account Mapping | General Info

The following tables provide lookups for the different elements comprising the chartfield string.

Business Units

Show 5 entries

CHBUS

Code	Description
CHBUS	Business Foundation

Showing 1 to 1 of 1 entries (filtered from 104 total entries)

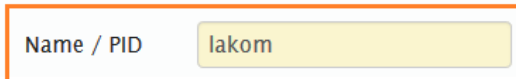
Previous Next

- The **Tools > Business References > Chartfield Lookup** tab is a search feature for ConnectCarolina chartfields
- You can search for business unit, fund, source, department, program, and earnings codes (for HR)
- You can search by alpha or numeric value

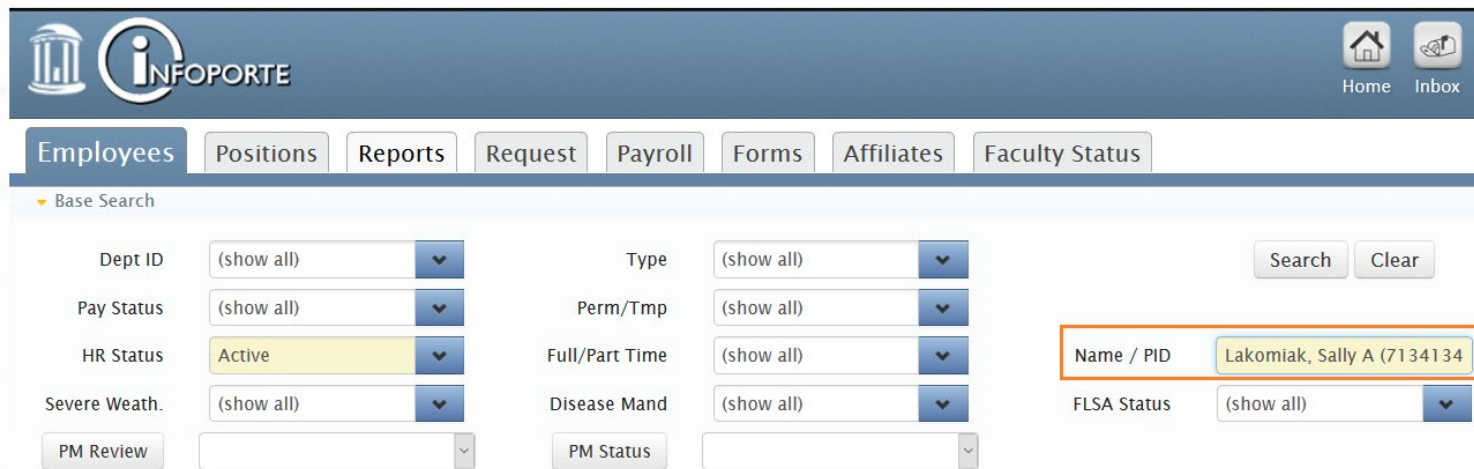


## Filter Fields within InfoPorte

The filter fields within InfoPorte have a built-in search.



Make sure you wait until the filter field populates and then click on the search value you want, before you hit the search button.





## Toggles within InfoPorte

The blue buttons are toggles. In the example below, the toggles affect the number of chartfield strings displayed in the search results. They never affect the grand total amount displayed.

- Toggle on **Program**, you see all the chartfield strings
- Toggle off **Program**, you see rolled-up chartfield strings

The screenshot displays the InfoPorte search interface. At the top, there are tabs for 'Ledger Rollups', 'Transactions', 'All GL Activity', 'Grants', 'Soft Encumbrances', 'Program/Cost Code', 'IPT Cost Code', and 'UNCFP'. Below these, there are sub-tabs for 'Main Ledgers', 'OSR Ledger', 'Parent Ledgers', and 'Capital Improvement'. The main search area contains several filters: 'Fund Type' (select), 'Fund' (show all), 'Fiscal Year' (2016), 'Source', 'Budget Period' (2016), 'Account', 'Acct Period' (show all), and 'Dept ID' (show all). On the right side, there is a 'Program' toggle button (highlighted with a red box), a 'Bus Unit' field, and checkboxes for 'Show Soft Encumbrances' and 'Show Projections'. At the bottom right, there are 'Search' and 'Clear' buttons. A note at the bottom states: '\*Toggle buttons to exclude/include optional fields for rollup groupings.'



## Help with System Access

The ConnectCarolina User Information website, [ccinfo.unc.edu](http://ccinfo.unc.edu), has a lot of good information about ConnectCarolina and InfoPorte. Start here to find information about getting access.

The screenshot shows the 'Connect CAROLINA' logo with the 'iNFOPORTE' logo below it, followed by the text 'User Information'. To the right is a search bar with a magnifying glass icon. Below the header is a blue navigation bar with the following links: 'Get Access', 'Training', 'HR & Payroll', 'Finance', 'Student Administration', 'Reporting', 'Research', 'News', and 'Troubleshooting'. A dropdown menu is open under 'Get Access', listing: '2-Step Verification', 'Access Request Forms', 'Access Roles', 'Getting Information from the Legacy Systems', 'How To Get Access' (highlighted with an orange box), 'Information for Access Request Coordinators', 'Information for InfoPorte Administrators', 'New & Prospective Students', 'Useful Links', and 'Wireless & Off-Campus Access'. The main content area is titled 'Get Access' and contains a paragraph explaining the process of requesting access to ConnectCarolina, InfoPorte, and various companion systems. To the right of the text is a large blue padlock icon. Below the text is a section titled 'Do you need information about access to:' followed by a list of links: 'ConnectCarolina', 'InfoPorte Reporting (Including SAS Reports)', 'Companion Systems (like Web Travel, PeopleAdmin, Slate)', 'ConnectCarolina Self-Service for Former Employees', and 'ConnectCarolina Self-Service for Former Students'.

Connect CAROLINA iNFOPORTE User Information

Get Access Training HR & Payroll Finance Student Administration Reporting Research News Troubleshooting

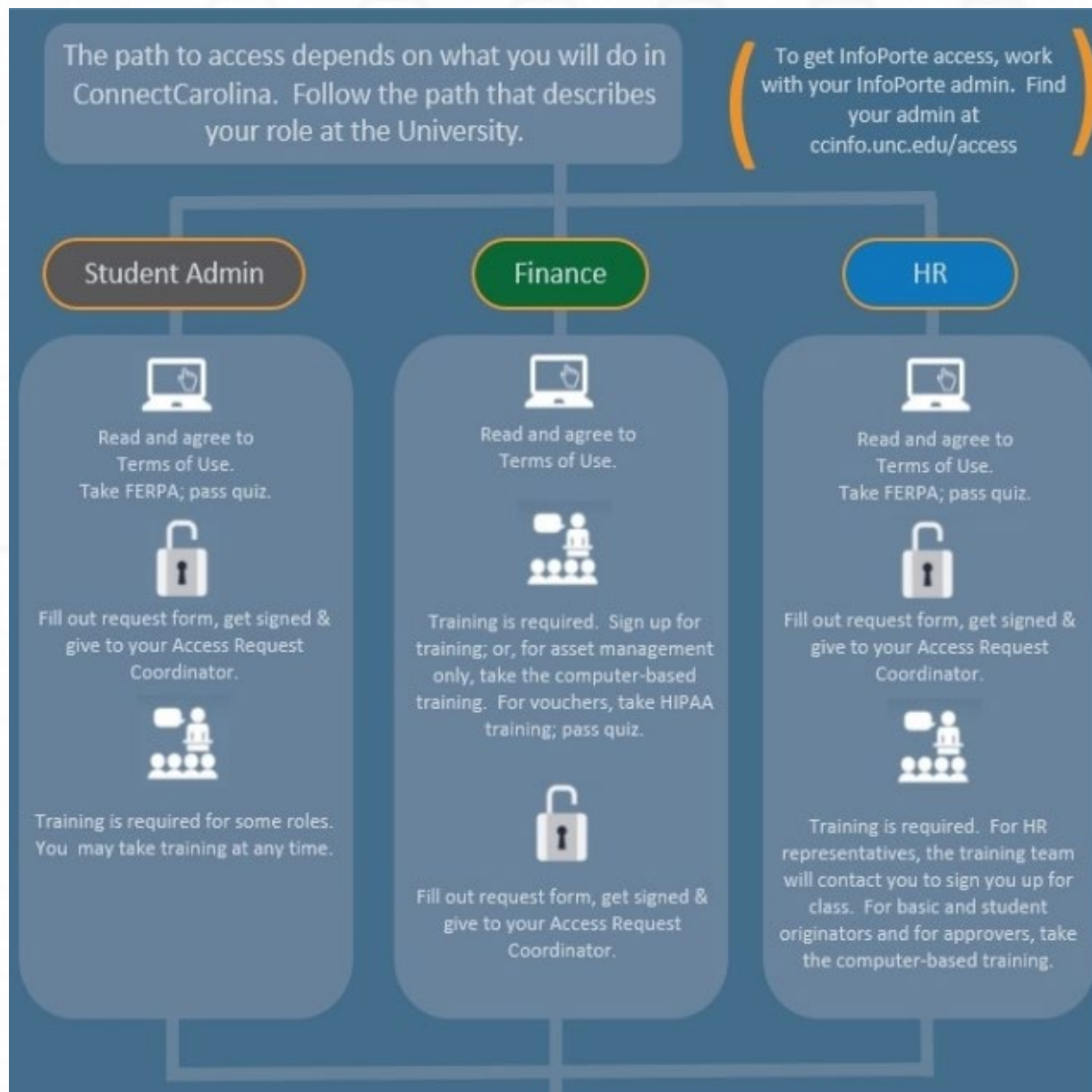
2-Step Verification  
Access Request Forms  
Access Roles  
Getting Information from the Legacy Systems  
**How To Get Access**  
Information for Access Request Coordinators  
Information for InfoPorte Administrators  
New & Prospective Students  
Useful Links  
Wireless & Off-Campus Access

### Get Access

To request access to ConnectCarolina, you work with your school or division's Access Request Coordinator, or ARC for short. To request access to InfoPorte for HR/Payroll and Finance reports (including the SAS reports), you work with your InfoPorte Administrator. To request access to Student Administration reports, you need to work with your ARC (that's because the Office of the University Registrar has to approve these requests). For access to many companion systems such as TIM or LawLogix, you also work with your ARC.

### Do you need information about access to:

- ConnectCarolina
- InfoPorte Reporting (Including SAS Reports)
- Companion Systems (like Web Travel, PeopleAdmin, Slate)
- ConnectCarolina Self-Service for Former Employees
- ConnectCarolina Self-Service for Former Students







## Help with System Access







## Help with System Access

Within the ConnectCarolina and InfoPorte links shown below, there is a list of Action Request Coordinators (ARCs) and InfoPorte Administrators for your school or division. Reach out to them with for all your access related needs/questions.

The screenshot shows the 'User Information' page of the ConnectCarolina and InfoPorte system. The page has a blue header with the 'Connect CAROLINA' and 'i INFOPORTE' logos. Below the header is a navigation bar with links: Get Access, Training, HR & Payroll, Finance, Student Administration, Reporting, Research, News, and Troubleshooting. A sidebar on the left lists various links under 'How To Get Access', including '2-Step Verification', 'Access Request Forms', 'Access Roles', 'Getting Information from the Legacy Systems', 'Information for Access Request Coordinators', 'Information for InfoPorte Administrators', 'New & Prospective Students', 'Useful Links', and 'Wireless & Off-Campus Access'. The main content area is titled 'Get Access' and contains a paragraph explaining how to request access to ConnectCarolina, InfoPorte, and companion systems. To the right of the text is a large blue padlock icon. Below the text is a list of links: 'ConnectCarolina', 'InfoPorte Reporting (Including SAS Reports)', 'Companion Systems (like Web Travel, PeopleAdmin, Slate)', 'ConnectCarolina Self-Service for Former Employees', and 'ConnectCarolina Self-Service for Former Students'. The 'ConnectCarolina' and 'InfoPorte Reporting (Including SAS Reports)' links are highlighted with an orange border.

Connect CAROLINA i INFOPORTE User Information

Get Access Training HR & Payroll Finance Student Administration Reporting Research News Troubleshooting

2-Step Verification  
Access Request Forms  
Access Roles  
Getting Information from the Legacy Systems  
How To Get Access  
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Wireless & Off-Campus Access

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**Do you need information about access to:**

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- InfoPorte Reporting (Including SAS Reports)
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- ConnectCarolina Self-Service for Former Employees
- ConnectCarolina Self-Service for Former Students



## PeopleSoft Roles Report

**\*\*ARC access required\*\***

The PeopleSoft Roles report in InfoPorte tells you what ConnectCarolina roles users have. You can view the report in InfoPorte and export it to excel.

Main Menu > Tools > Access Request > PeopleSoft Roles

The screenshot shows the PeopleSoft Roles report interface. At the top, there are three tabs: 'Reservations', 'Data Dictionary', and 'Access Request'. The 'Access Request' tab is selected and highlighted with an orange border. Below this, there are two sub-tabs: 'Reporting' and 'Request Tool'. The 'Reporting' sub-tab is selected, and within it, the 'Access Request List' sub-tab is selected, with 'PeopleSoft Roles' highlighted by an orange box. Below the sub-tabs, there are search fields for 'User', 'Functional Area', 'Application', 'Role', and 'Dept ID'. Each field has a dropdown arrow next to it. The 'Role' and 'Dept ID' fields are currently set to '(show all)'.

Use the search fields to choose which users you want to see, and click the **Search** button.



## More Information – Reporting Guides

On ccinfo.unc.edu under the Reporting menu, there is a Reports Guide for Finance, HR/Payroll and Student Admin Report.



User Information

Get Access ▾ Training ▾ HR & Payroll ▾ Finance ▾ Student Administration ▾ Reporting ▾ Research ▾ News ▾

**ConnectCarolina User Conference**

**Connect CAROLINA** NEWSLETTER  
ConnectCarolina@unc.edu | Date: February 22, 2017

**Top News in Brief**

Granting Status A Request to Help Free Press Affiliates  
New Report Makes Decision-Making Around Language Profiling Easier  
More Considered Way of Understanding Accessibility for Students

- Search Reporting
- Finance Reports Guide
- HR/Payroll Reports Guide
- InfoPorte Release Notes
- Queries List
- Student Admin Reports Guide



## More Information – Reporting Guides

Each Reporting Guide, provides the following:

- Report and Navigation within InfoPorte
- Report Description
- What Does It Help Me Do?
- Available Training

Report & Menu	Description	What Does It Help Me Do?	Available Training
<b>Finding Budget Balances</b>			<a href="#">Back to top ^</a>
InfoPorte: Ledger Rollup Tabs			
Finance > Dept Accounting >  • Main Ledgers - for State, F&A and Trust funds	<ul style="list-style-type: none"><li>• Shows revenue and expense totals and available balance by budget chartfield strings.</li><li>• Breaks out spending totals by pre-encumbrance, encumbrance and expense (Actuals YTD column).</li></ul>	<ul style="list-style-type: none"><li>• Keep an eye on your available budget balance and spending during the month.</li><li>• Include projected earnings and fringe in your balances by choosing <b>Yes</b> in the Show Projections filter.</li></ul>	<ul style="list-style-type: none"><li>• <a href="#">Why Do My Balances Go Up and Down Throughout the Month Handout</a></li><li>• <a href="#">Financial Reporting in InfoPorte</a></li></ul>



## More Information – Reporting Guides

- The “Take me directly to:” drop down finds a specific topic while the search box can find particular words.
- The Reporting guides can be downloaded to PDF, although, it is recommended to use the website so you have the most up to date information.

The screenshot shows the 'Connect CAROLINA infoPORTE' User Information page. The navigation bar includes links for Get Access, Training, HR & Payroll, Finance, Student Administration, Reporting, Research, News, and Troubleshooting. The main heading is 'Quick Reference Guide to Finance Reports'. Below this, there are icons and links for Key Terms, FAQs, Submit Question, New Report Request, and Download as PDF. A 'Take me directly to:' dropdown menu is set to 'Finding Budget Balance', with a 'Submit' button next to it. A search bar is also present. Below these elements is a table with four columns: Report & Menu, Description, What Does It Help Me Do?, and Available Training. The table lists 'Finding Budget Balances' under the 'Report & Menu' column. The 'Description' column provides details about the report, including its purpose and how to use it. The 'What Does It Help Me Do?' column lists specific tasks the report can assist with. The 'Available Training' column provides links to related training materials.

Connect CAROLINA infoPORTE User Information

Get Access ▾ Training ▾ HR & Payroll ▾ Finance ▾ Student Administration ▾ Reporting ▾ Research ▾ News ▾ Troubleshooting ▾

Home / Featured Resources / Quick Reference Guide to Finance Reports

### Quick Reference Guide to Finance Reports

Key Terms FAQs Submit Question New Report Request Download as PDF

Take me directly to:

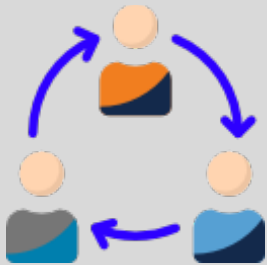
Finding Budget Balance

Search:

Report & Menu	Description	What Does It Help Me Do?	Available Training
<b>Finding Budget Balances</b>			<a href="#">Back to top ^</a>
<b>InfoPorte: Ledger Rollup Tabs</b>			
Finance > Dept Accounting >	<ul style="list-style-type: none"><li>• Main Ledgers – for State, F&amp;A and Trust funds</li></ul>	<ul style="list-style-type: none"><li>• Shows revenue and expense totals and available balance by budget chartfield strings.</li><li>• Breaks out spending totals by pre-encumbrance, encumbrance and expense (Actuals YTD column).</li></ul>	<ul style="list-style-type: none"><li>• Keep an eye on your available budget balance and spending during the month.</li><li>• Include projected earnings and fringe in your balances by choosing Yes in the Show Projections filter.</li></ul>

[Why Do My Balances Go Up and Down Throughout the Month Handout](#)

[Financial Reporting in InfoPorte](#)



**Thank You for Your Participation!**

