ConnectCarolina 2018 User Conference

Tips and Tricks for InfoPorte

Presenter: Sally Lakomiak and Keith Jones

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:

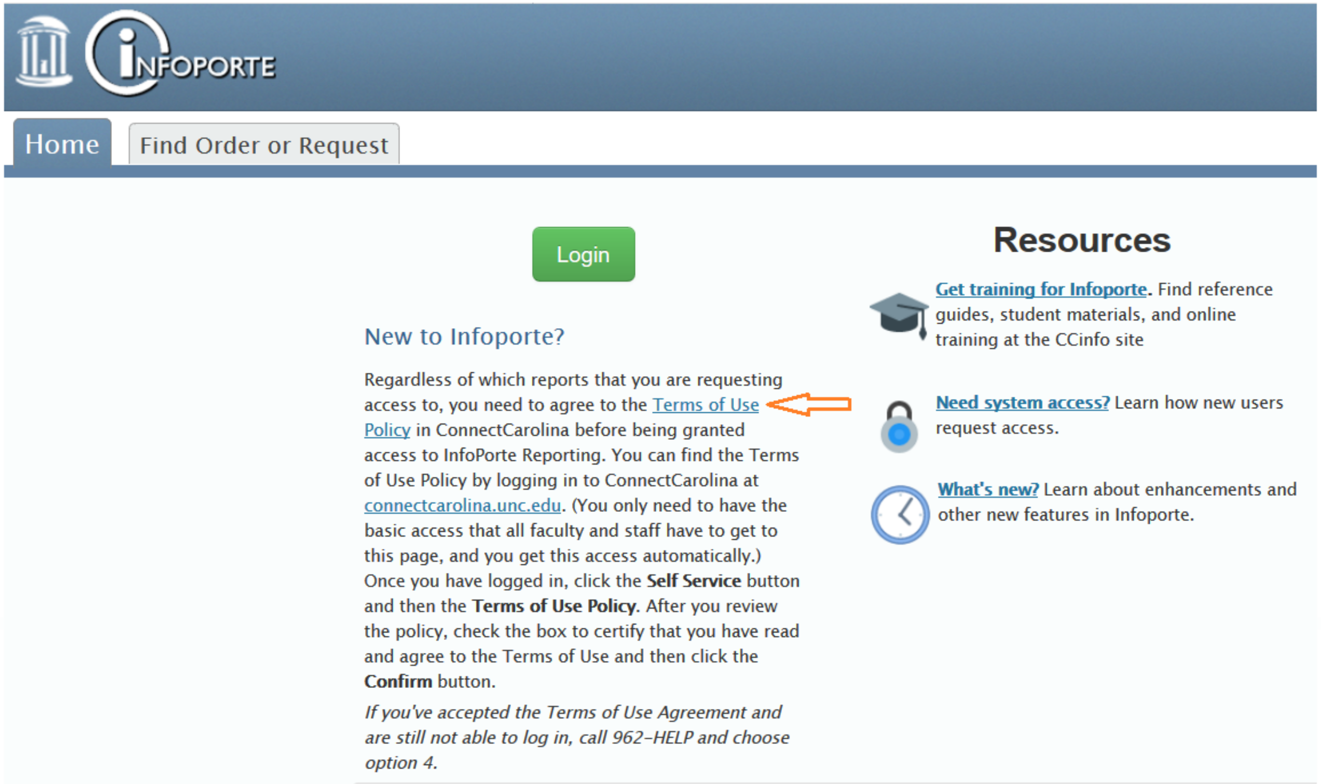
1. Go directly to InfoPorte: infoporte.unc.edu

2. From ConnectCarolina, click Enterprise Reporting on the left

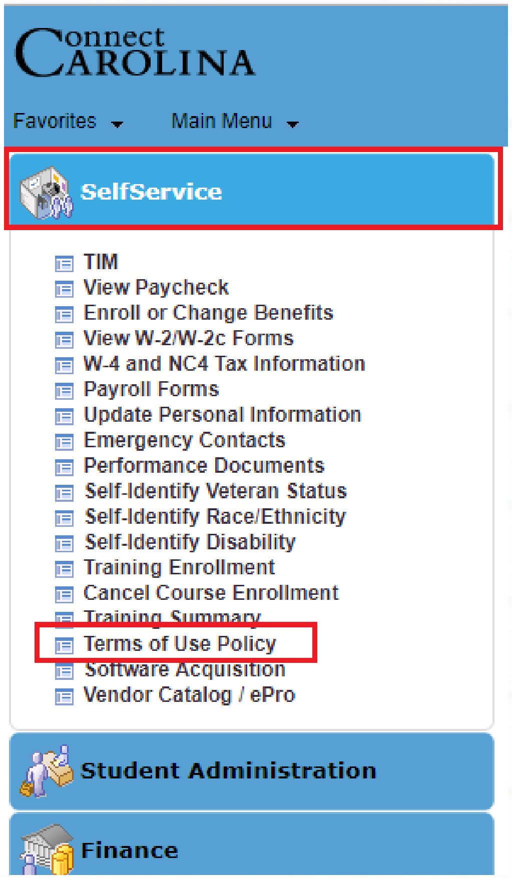
Note:
InfoPorte works best with Mozilla Firefox.

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.

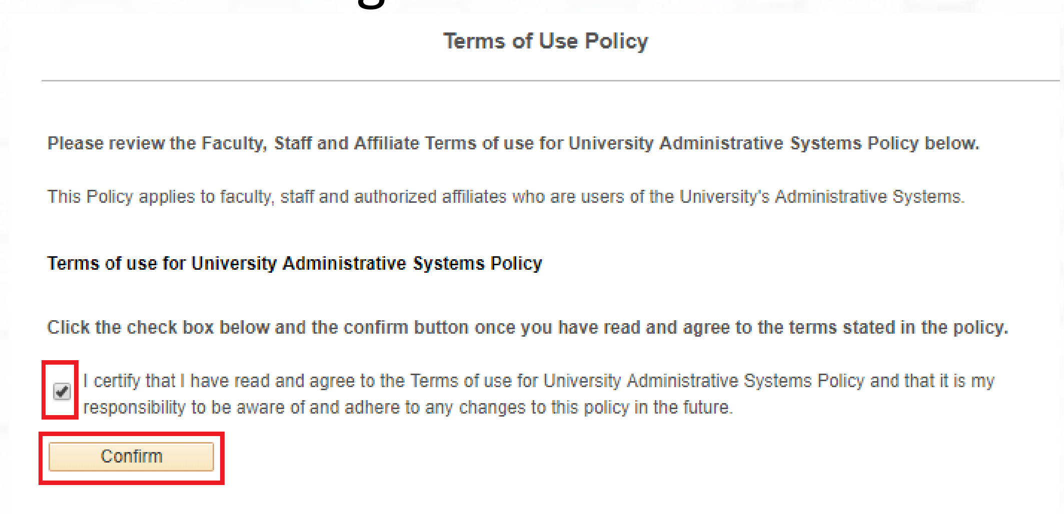


Accepting Terms of Use



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.



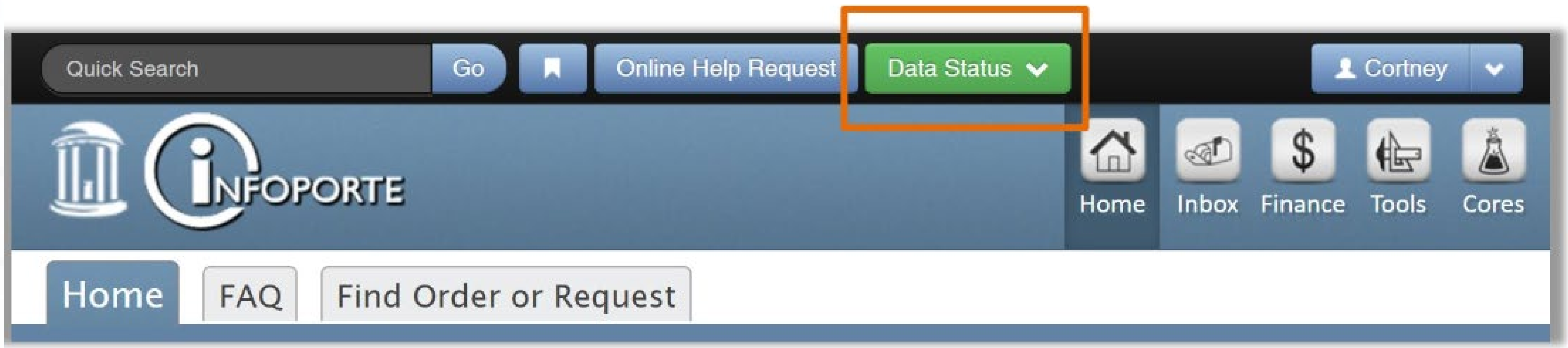
Use the Right Browser

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.

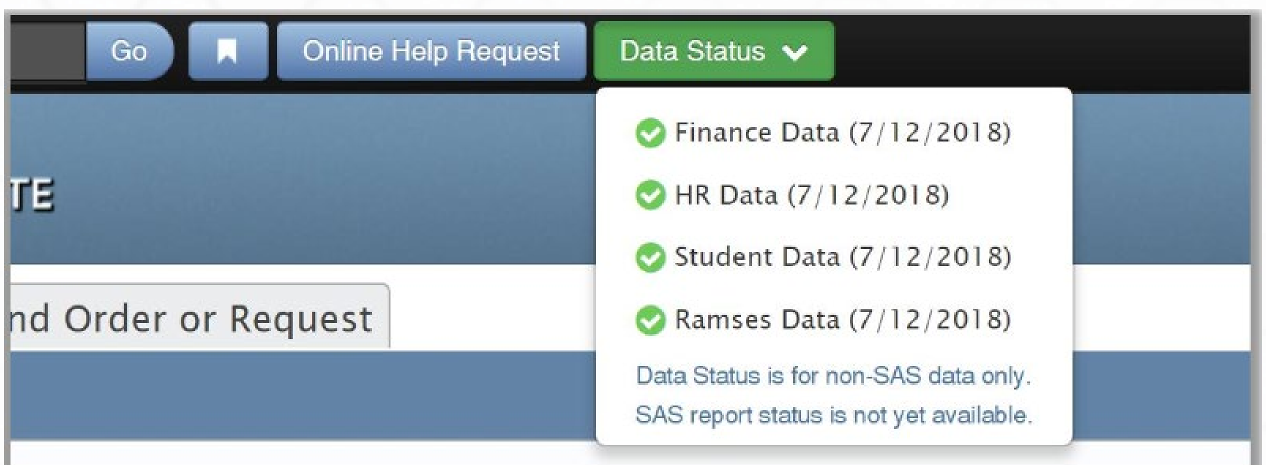
InfoPorte Data

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



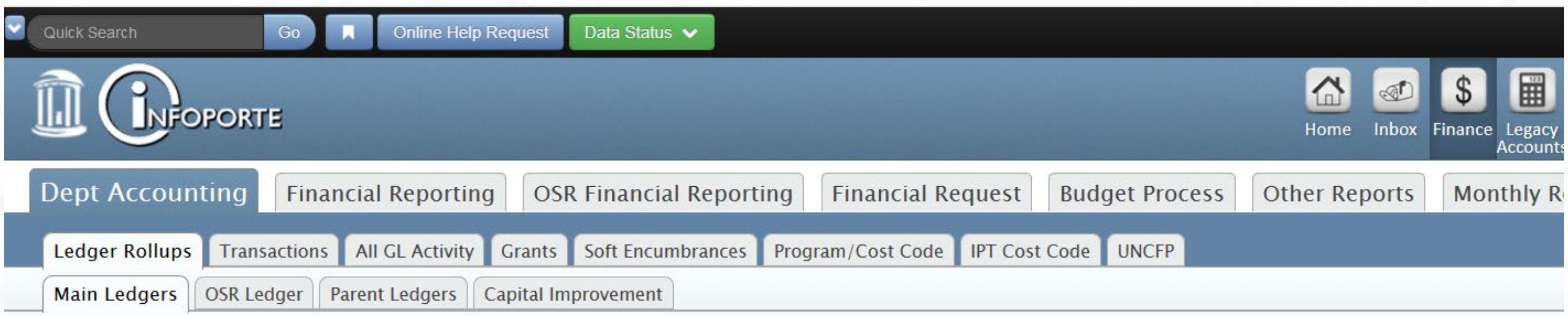
InfoPorte Data: Data Status button

- 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.



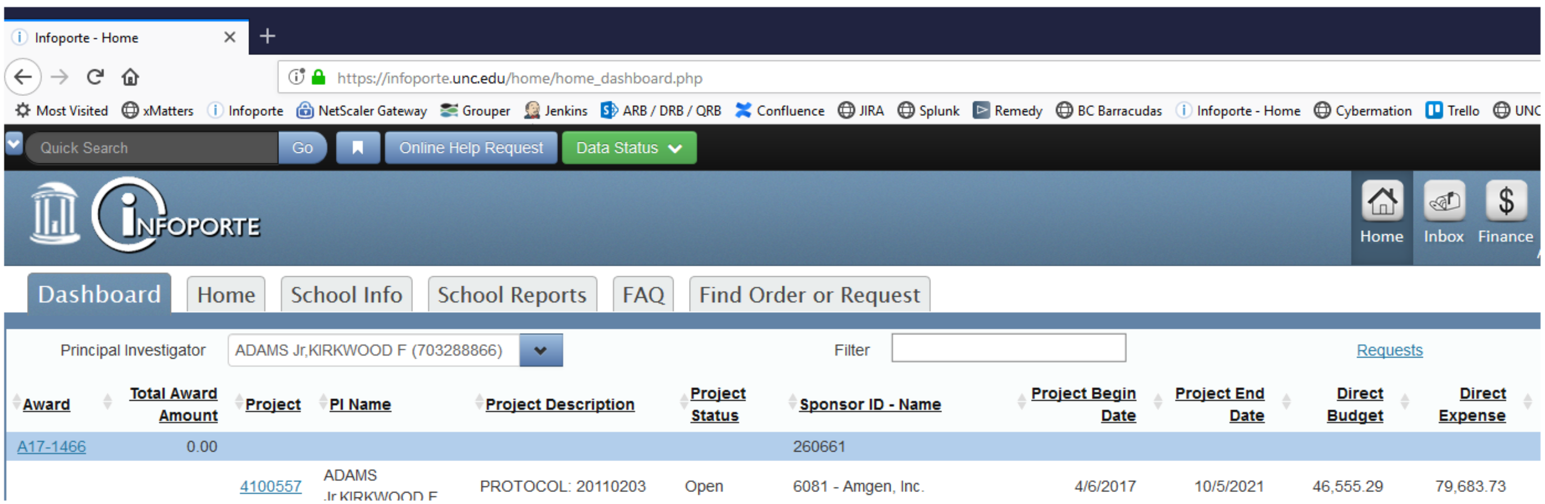
If you hold the Ctrl key and hit the – key, the display of the browser will decrease.

Making the connections

Open Another Browser Tab

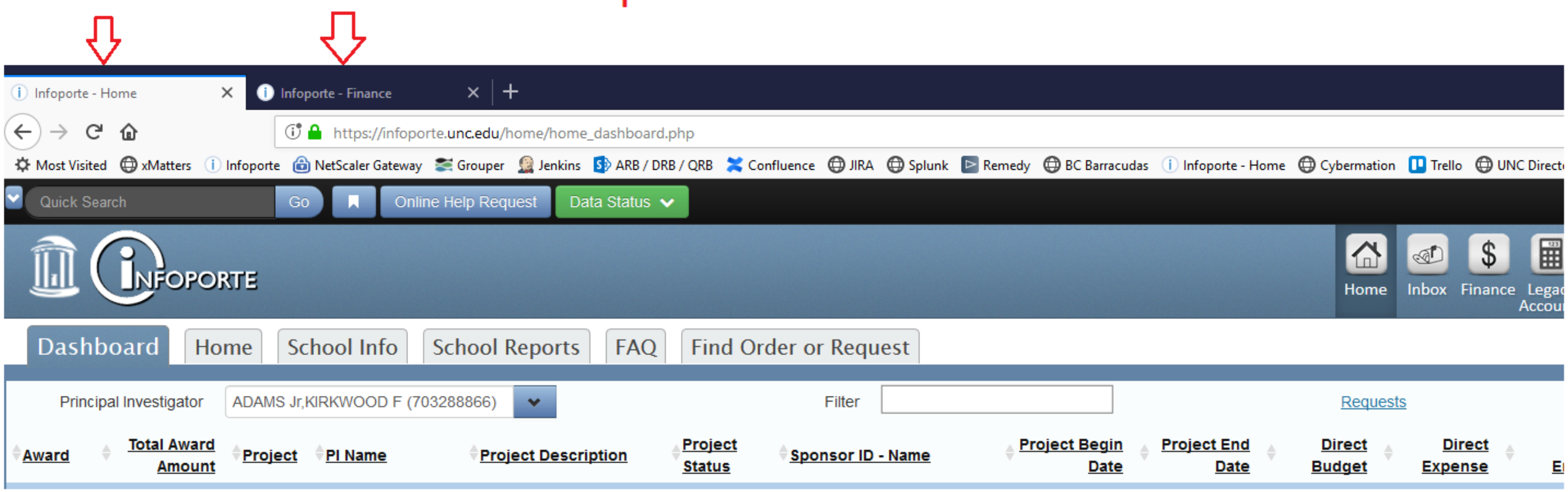
Hold down the Ctrl key on your keyboard and click another tab, button or report within the current page.

One browser tab is open.



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

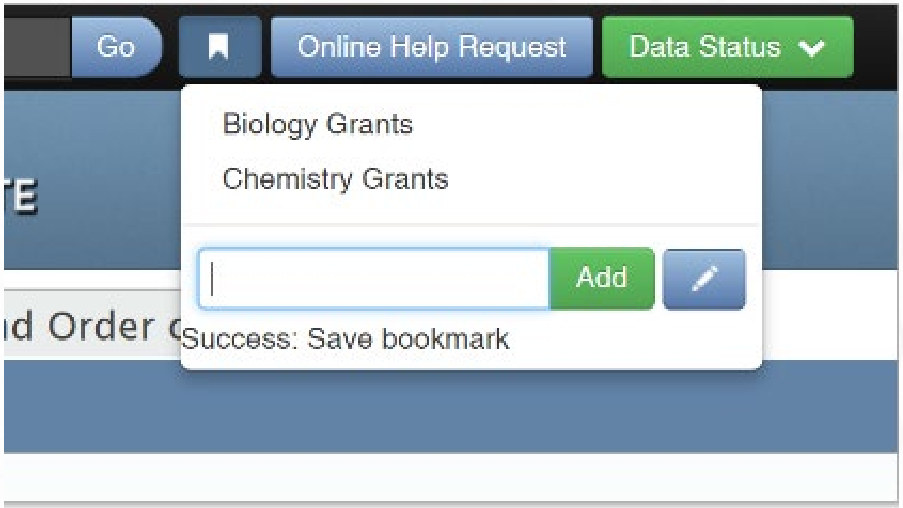


Favorites

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



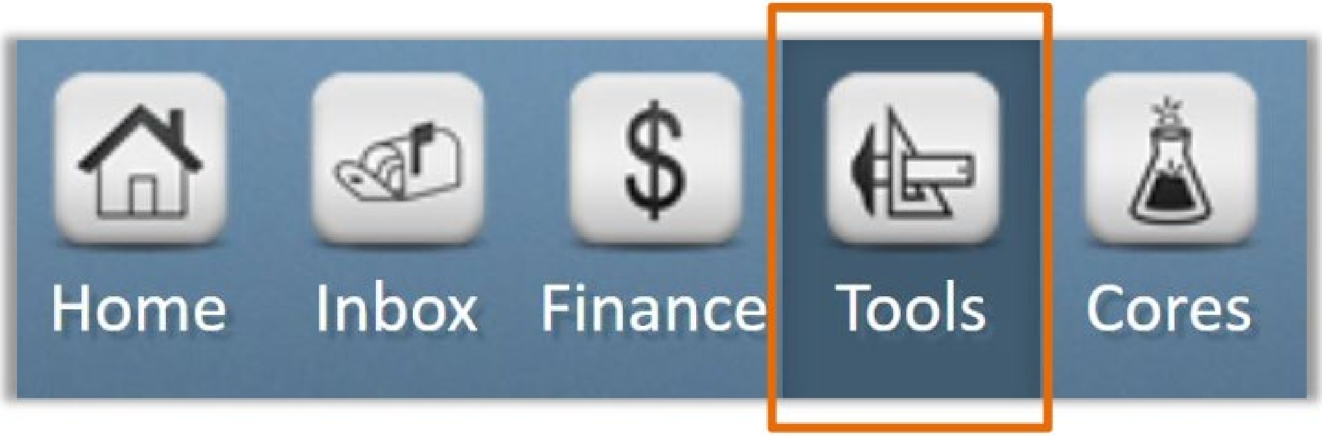
To delete a Favorite:

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

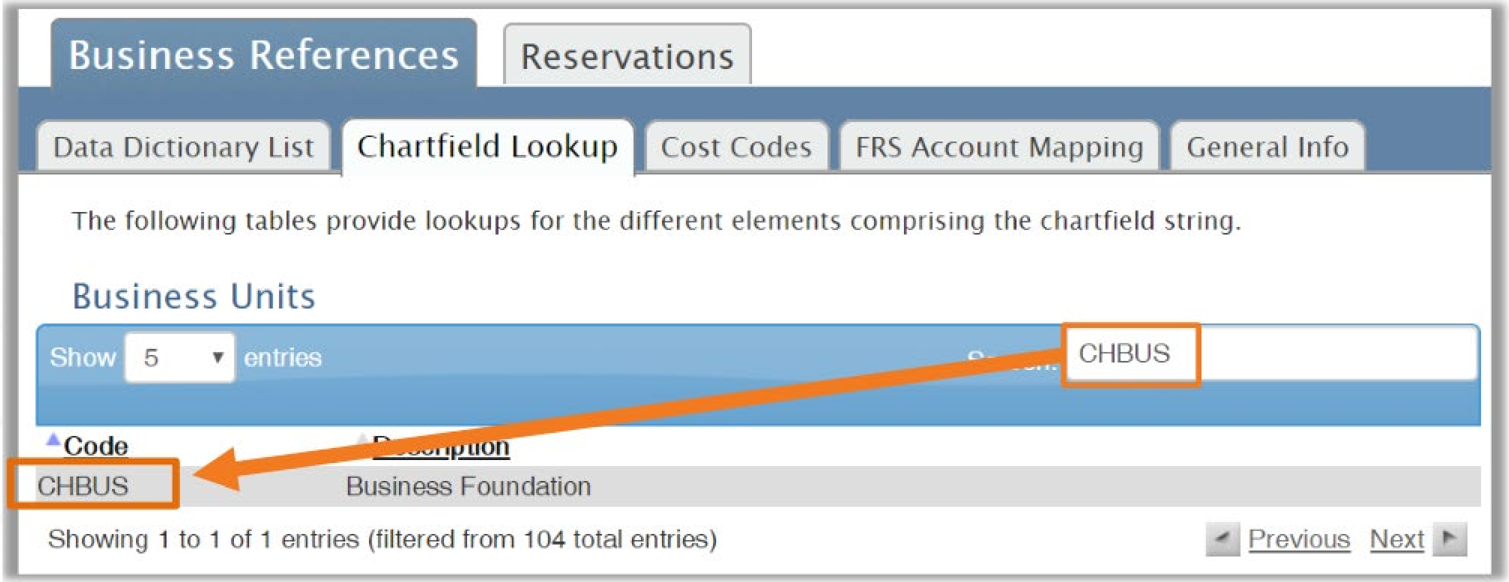
Note:

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

Looking Up Chartfields



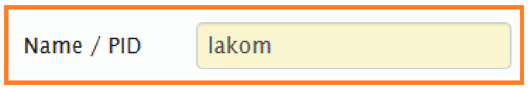
Looking Up Chartfields



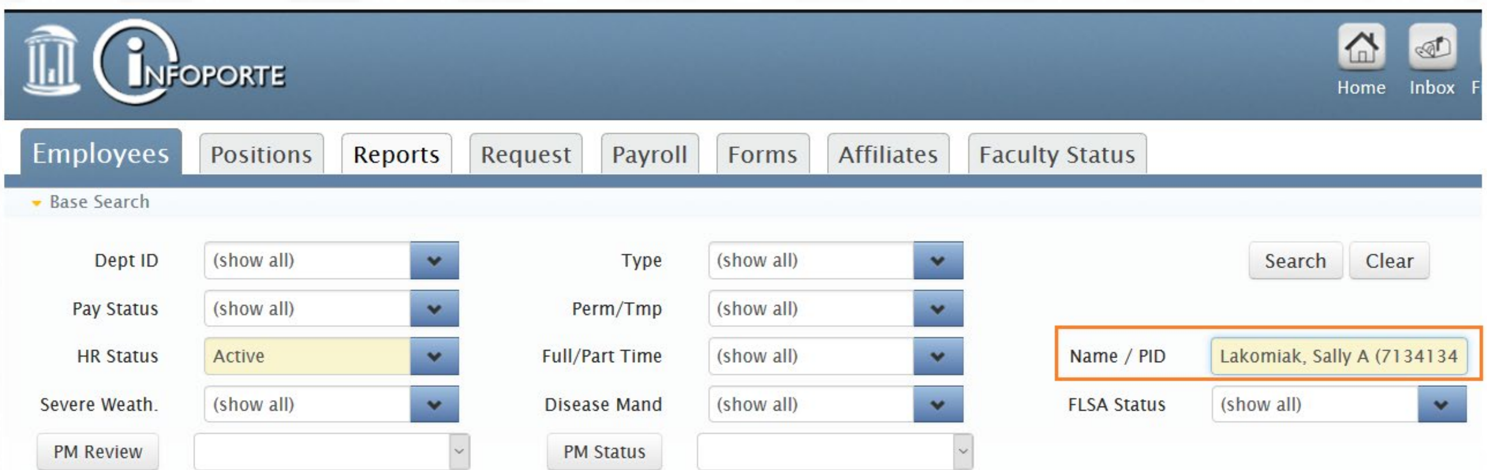
- The **Tools > Business References > Chartfield Lookup** tab is a search feature for ConnectCarolina chartfields
- You can search for business unit, fund, source, department, program, and earnings codes (for HR)
- You can search by alpha or numeric value

Filter Fields within InfoPorte

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



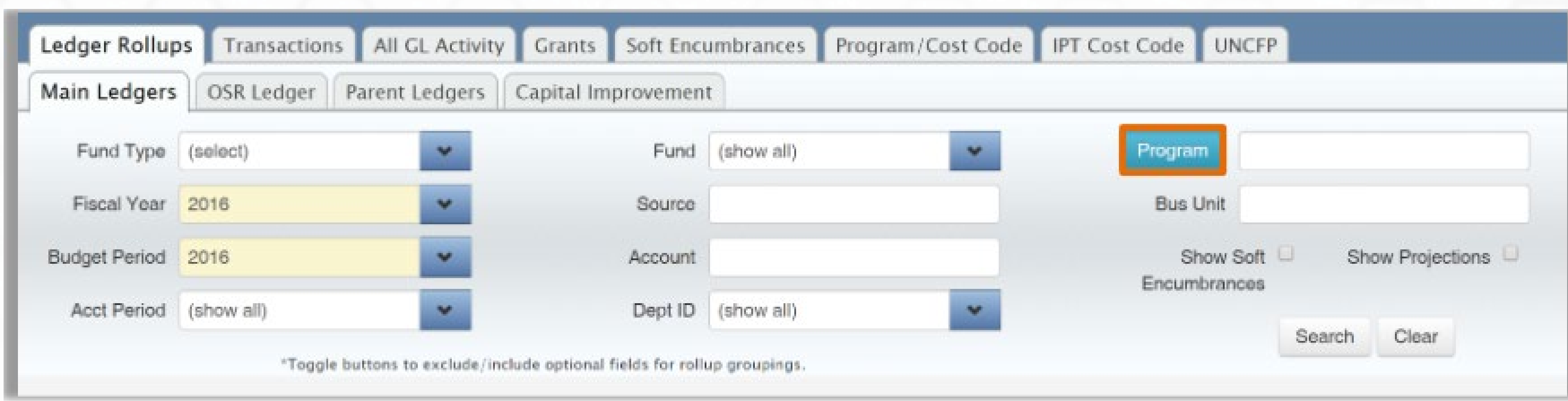
Make sure you wait until the filter field populates and then click on the search value you want, before you hit the search button.



Toggles within InfoPorte

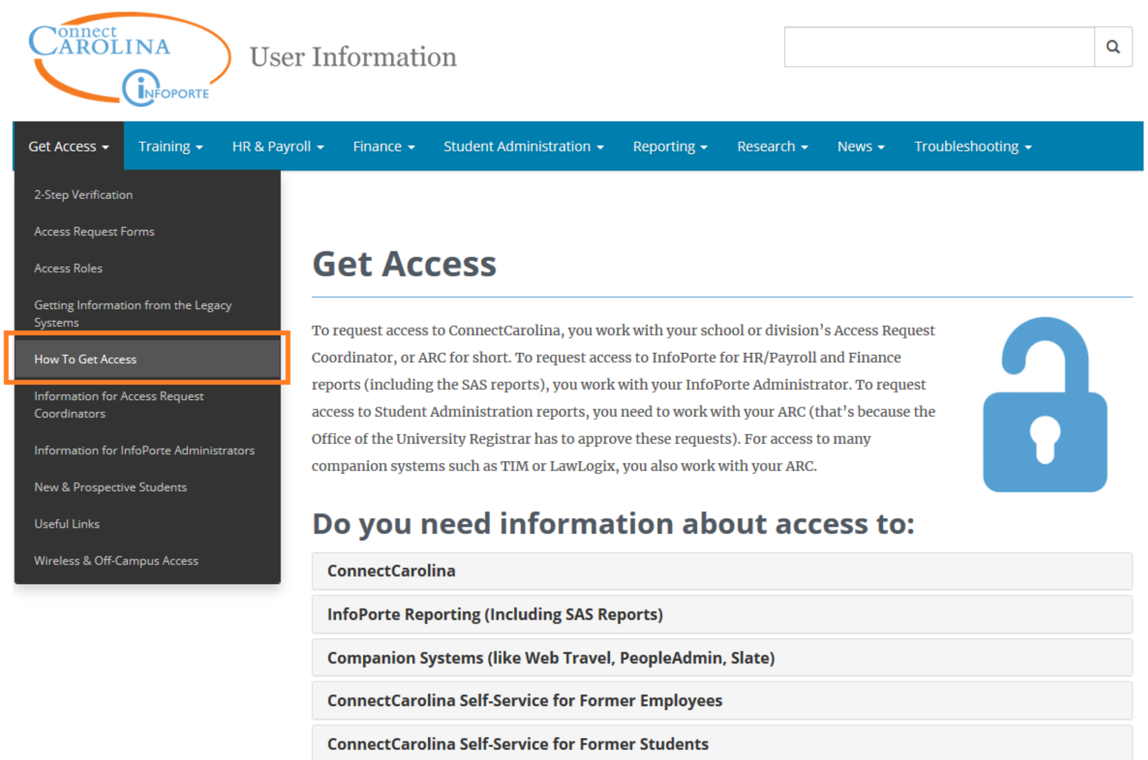
The blue buttons are toggles. In the example below, the toggles affect the number of chartfield strings displayed in the search results. They never affect the grand total amount displayed.

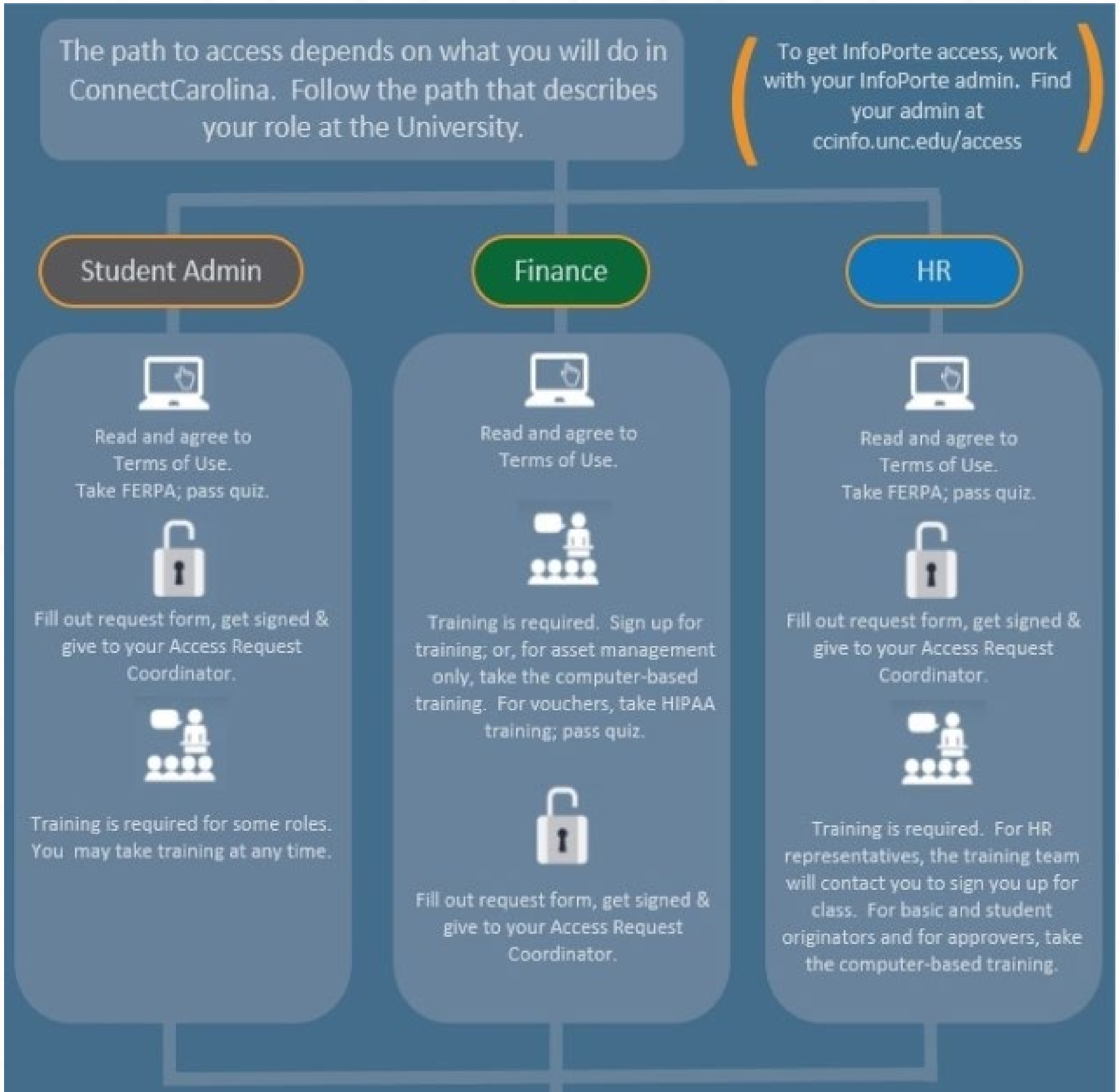
- Toggle on Program, you see all the chartfield strings
- Toggle off Program, you see rolled-up chartfield strings



Help with System Access

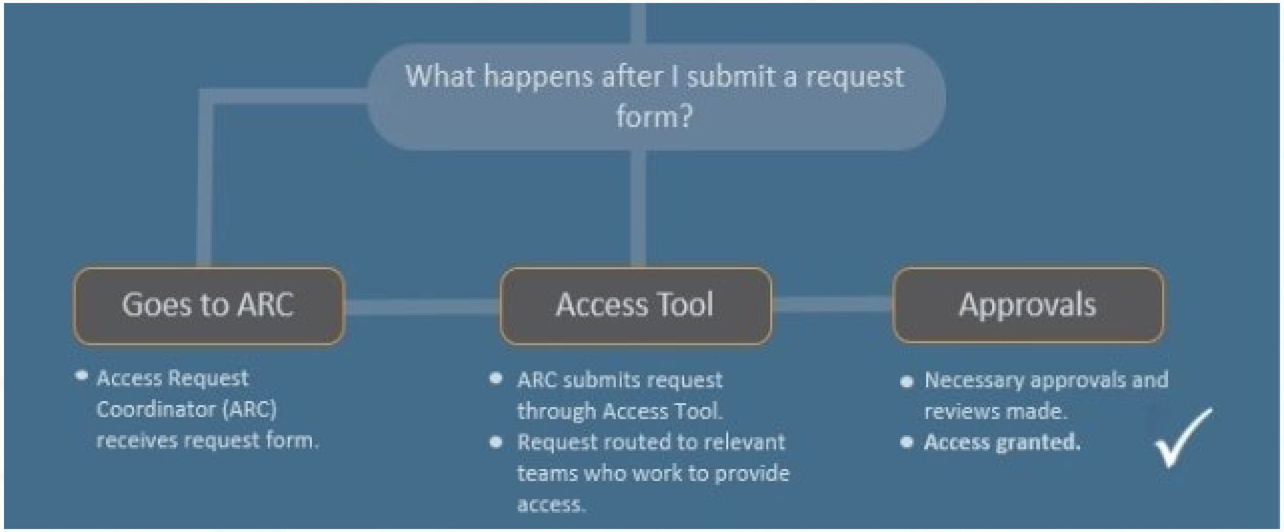
The ConnectCarolina User Information website, ccinfo.unc.edu, has a lot of good information about ConnectCarolina and InfoPorte. Start here to find information about getting access.





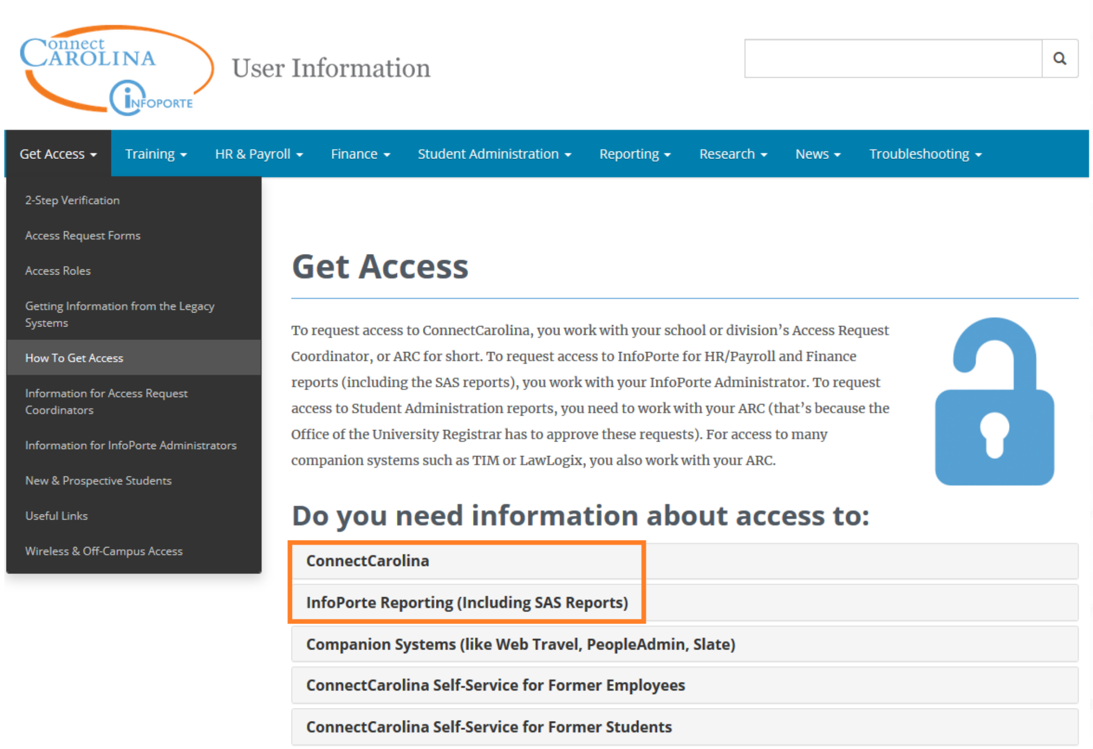
The path to access depends on what you will do in ConnectCarolina. Follow the path that describes your role at the University.
To get InfoPorte access, work with your InfoPorte admin. Find your admin at ccinfo.unc.edu/access
Student Admin
Finance
HR
Read and agree to Terms of Use. Take FERPA; pass quiz.
Fill out request form, get signed & give to your Access Request Coordinator.
Training is required for some roles. You may take training at any time.
Read and agree to Terms of Use.
Training is required. Sign up for training; or, for asset management only, take the computer-based training. For vouchers, take HIPAA training; pass quiz.
Fill out request form, get signed & give to your Access Request Coordinator.
Read and agree to Terms of Use. Take FERPA; pass quiz.
Fill out request form, get signed & give to your Access Request Coordinator.
Training is required. For HR representatives, the training team will contact you to sign you up for class. For basic and student originators and for approvers, take the computer-based training.

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.



PeopleSoft Roles Report

****ARC access required****

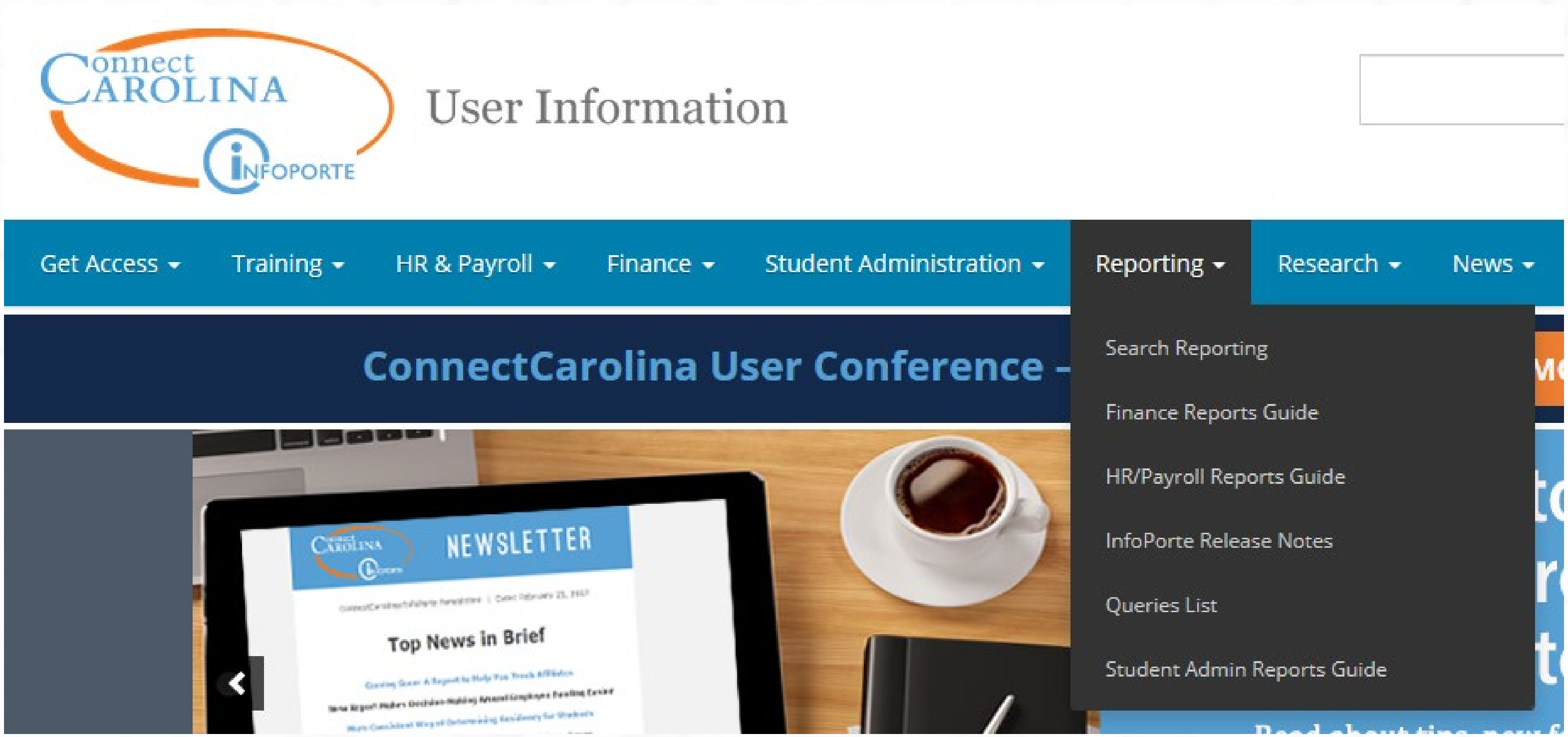
The PeopleSoft Roles report in InfoPorte tells you what ConnectCarolina roles users have. You can view the report in InfoPorte and export it to excel.

Main Menu > Tools > Access Request > PeopleSoft Roles

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.



More Information – Reporting Guides

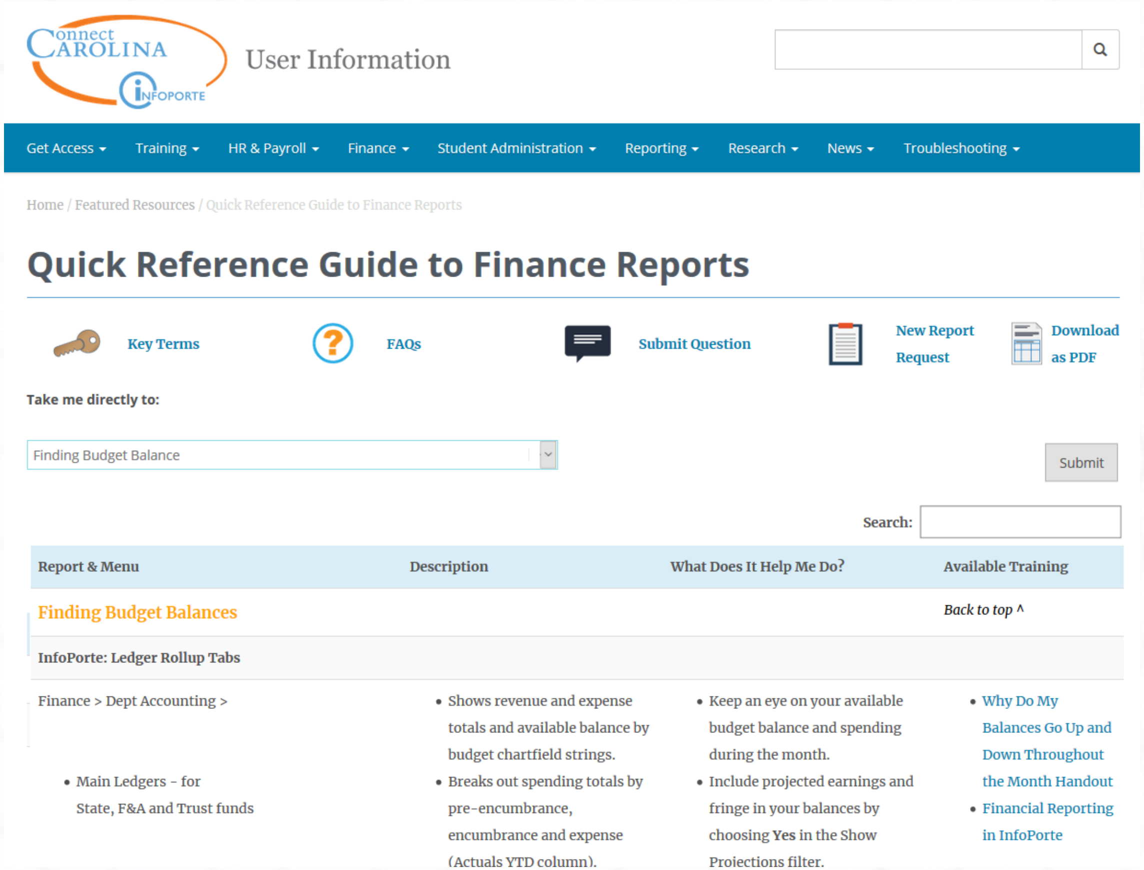
Each Reporting Guide, provides the following:

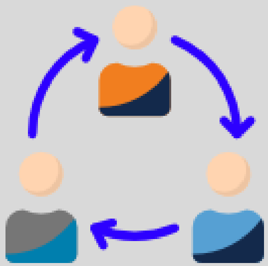
- Report and Navigation within InfoPorte
- Report Description
- What Does It Help Me Do?
- Available Training

Report & Menu	Description	What Does It Help Me Do?	Available Training
Finding Budget Balances			*Back to top ^*
InfoPorte: Ledger Rollup Tabs			
Finance > Dept Accounting > • Main Ledgers – for State, F&A and Trust funds	• Shows revenue and expense totals and available balance by budget chartfield strings. • Breaks out spending totals by pre-encumbrance, encumbrance and expense (Actuals YTD column).	• Keep an eye on your available budget balance and spending during the month. • Include projected earnings and fringe in your balances by choosing **Yes** in the Show Projections filter.	• Why Do My Balances Go Up and Down Throughout the Month Handout • Financial Reporting in InfoPorte

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.





Thank You for Your Participation!