

Release 9.0, June 28, 2019

Summary of the Changes

New Access Request Tool

- A small pilot group of Access Request Coordinators (ARCs) have access to use this revamped tool. Later this summer, all ARCs will have access to this tool. ([click here for more details](#))

Access Page Updates

- The Access Page (found under Settings > Access) now has additional information to help Access Request Coordinators (ARCs) and InfoPorte Administrators when they're looking at access information for employees. ([click here for more details](#))

Finance

- The ID for Payroll Adjustment Accounting Tool (PAAT) transactions has been added to four Finance reports. ([click here for more details](#))
- The Chartfield Lookup report now has a status field and status filter. ([click here for more details](#))

HR/Payroll

- A column description has been changed on the Salary Alignment Report to more accurately reflect the information that's displayed. ([click here for more details](#))

Student Administration

- Just like we did on the Term Enrollment report, the Major Academic Plan filter drop down has been updated on the Degree Candidates report and the Degree Recipients report. ([click here for more details](#))
- You can now export the Cumulative Degree GPA and Cumulative Degree Units from the Degree Recipients report. ([click here for more details](#))

Cores

- The NIH Report now has a date filter that defaults to current month. ([click here for more details](#))
- You can now export the Payment Details column when you export the Sales report to Excel. ([click here for more details](#))

Miscellaneous

- We also have behind the scenes bug fixes and improvements to infrastructure going into InfoPorte as part of this release.

Need help with InfoPorte? Resources are available:

- Go to ccinfo.unc.edu and click the Reporting tab to view the Finance, Student and HR reporting quick reference guides.
- Go to ccinfo.unc.edu and click the Training tab to access computer-based training.
- Call the help desk at 962-HELP or submit a help ticket at help.unc.edu.

New Access Request Tool

Later this summer, we'll be rolling out a revamped Access Request Tool that will let you submit one request even if the employee needs access to Finance, HR/Payroll, and Student Admin pages. You'll submit one electronic request, called the main request, and the system will create sub-requests that each go through their separate approval process. Each piece of access will be granted individually, so employees who need access won't have to wait on all access to be approved before they receive any access.

We'll provide training for all ARCs before the system goes live for everyone later this summer, so be on the lookout for an invitation after the pilot.

Reporting
Request Tool
Request Tool New

General Info

Request Type
Grant Access


Access For
Test, Test
"Last, First" or "First Last" or PID

Name or Request Title
New Access Request Tool

Effective Date
06/21/2019

Request Description
New Access Request Tool

Employee
PID
Onyen
Home Dept ID


Test, Test

Type
Title
Email
Phone

Receive Status Emails
☐

Data Level Access
New Access Request Tool

Functional Areas

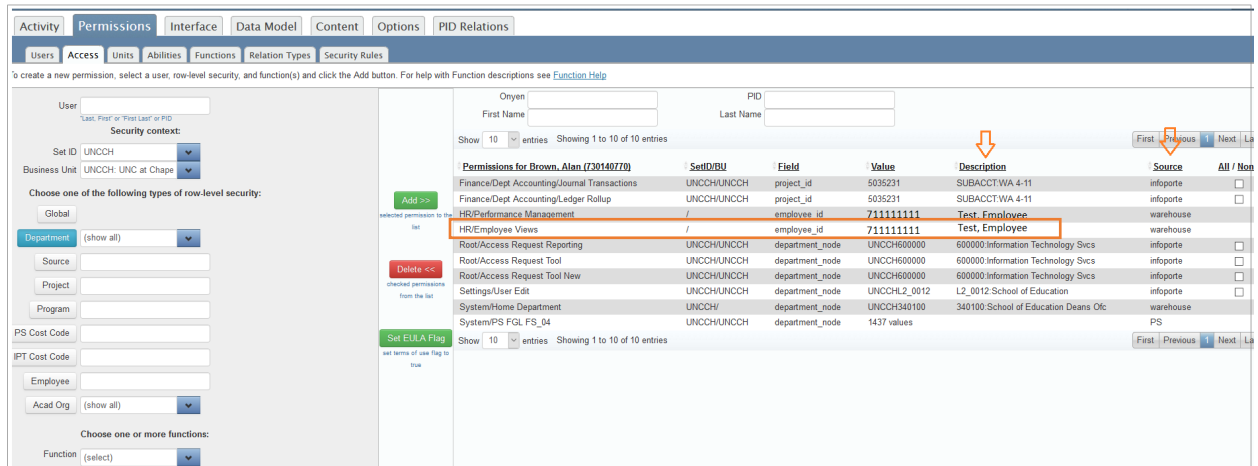
Access Request Tool
Finance
Human Resources / Payroll
Student Administration

(show all)
(show all)
(show all)
(show all)

Updates to the InfoPorte Access Page

We've made these changes to the Access page (found under Settings > Permissions > Access):

Added a description column to provide more information about what access an employee has in InfoPorte. For example, if an HR Rep has access to Employee Views for one employee, the employee's name is shown in the description field. All InfoPorte access that an employee has now shows on this page, along with a column that indicates where that access was granted from.



Activity Permissions Interface Data Model Content Options PID Relations

Users Access Units Abilities Functions Relation Types Security Rules

to create a new permission, select a user, row-level security, and function(s) and click the Add button. For help with Function descriptions see [Function Help](#)

User: Last, First or First Last or PID

Security context:

Set ID: UNCOCH

Business Unit: UNCOCH: UNC at Chapel Hill

Choose one of the following types of row-level security:

Global

Departments (show all)

Source

Project

Program

PS Cost Code

PT Cost Code

Employee

Acad Org (show all)

Choose one or more functions:

Function (select)

Origen: PID:

First Name: Last Name:

Show 10 entries Showing 1 to 10 of 10 entries

SetID/BU	Field	Value	Description	Source	All / Non
Finance/Dept Accounting/Journal Transactions	project_id	5035231	SUBACCT WA 4-11	infoporte	<input type="checkbox"/>
Finance/Dept Accounting/Ledger Rollup	project_id	5035231	SUBACCT WA 4-11	infoporte	<input type="checkbox"/>
HR/Performance Management	employee_id	711111111	Test, Employee	warehouse	<input type="checkbox"/>
HR/Employee Views	employee_id	711111111	Test, Employee	warehouse	<input type="checkbox"/>
Root/Access Request Reporting	department_node	UNCOCH60000	60000 Information Technology Sics	infoporte	<input type="checkbox"/>
Root/Access Request Tool	department_node	UNCOCH60000	60000 Information Technology Sics	infoporte	<input type="checkbox"/>
Root/Access Request Tool New	department_node	UNCOCH60000	60000 Information Technology Sics	infoporte	<input type="checkbox"/>
Settings/User Edit	department_node	UNCOCH2_0012	L2_0012 School of Education	infoporte	<input type="checkbox"/>
System/Home Department	department_node	UNCOCH	340100 School of Education Deans Ofc	warehouse	<input type="checkbox"/>
System/PS FGL FS_04	department_node	1437 values	PS	PS	<input type="checkbox"/>

Show 10 entries Showing 1 to 10 of 10 entries

First Previous Next Last

InfoPorte System Updates



Finance – Four Finance Reports Now Have a PAAT ID Column

To help with reconciling, the PAAT transaction ID has been added to the following Finance reports within InfoPorte:

Dept Accounting > Transactions

Dept Accounting > Program/Cost Code > Transactions

Dept Accounting > UNCFP > Transactions

Monthly Reports

The PAAT ID is now shown in the Reference 1 field.

Monthly Financial Report - STATE DETAIL											
Month Ending: Jun 30 2019											
Fund Group: STATE - Bus Unit: UNCFP - Fund: 20170 - Source: 12001 (AA-Appropriation/Central Rcts) - Dept: 213010											
Acct	Acct Descr	Prog	Project	Cost Code 1	Cost Code 2	Cost Code 3	Description	Trans Type	Trans ID	Reference1	Reference2
		10000					Test, Employee	HR PAYROLL	22-JUN-2019_108	711111111 (PAAT ID: 138216)	FAT0578693_316
		10000					Test, Employee	HR PAYROLL	22-JUN-2019_108	711111111 (PAAT ID: 138216)	FAT0578693_316

InfoPorte System Updates



Finance – Chartfield Lookup Report Now Includes a Status Field and Filter

The Chartfield Lookup report (found under Tools > Business References) now has a Status field and a status filter for each of the chartfield values to let you know which chartfield values are active or inactive.

The screenshot displays the InfoPorte interface for the Chartfield Lookup report. The top navigation bar includes links for Home, Inbox, Finance, Legacy Accounts, HR, Legacy HR, Faculty, Legacy Faculty, Student, Tools, Core, and Settings. The main menu shows Contracts, Business References, Reservations, and Access Request. The Business References section is active, showing Data Dictionary List, Data Dictionary Edit, Chartfield Lookup, Cost Codes, FRS Account Mapping, and General Info. The Chartfield Lookup page displays two tables: Business Units and Fund Code. Both tables have a 'Status' field and a status filter. The Business Units table shows 105 entries, and the Fund Code table shows 314 entries (filtered from 349 total entries).

* Code	Description	Status
ALBC	Acad Initiatives - UBC	A
ATHLT	Athletics	A
AVCDS	AVC Adm and Bus Services	A
AVCFN	Assoc VC Finance	A
AVCFP	Assoc VC Fac Plan & Const	A

* Code	Description	Status
00000	Tree Node Range Fund	A
10100	Gen Adm-Control Fund	A
10141	Gen Adm-UNIC CFTV	A
10142	Gen Adm-Community Service	A
10144	Gen Adm-MCNC Contract	A

HR/Payroll – Updated Column Heading on the Salary Alignment Report

The column description has been updated from FTE Salary to 1.0 FTE Salary on the Salary Alignment report. This reduces confusion when an employee has a pro-rated salary, since the column shows what the salary would be at 1.0 FTE.

The screenshot displays the InfoPorte interface for the Salary Alignment report. The top navigation bar includes links for Home, Inbox, Finance, Legacy Accounts, HR, Legacy HR, Faculty, Legacy Faculty, Student, Tools, Core, and Settings. The main menu shows Employees, Positions, Reports, Request, Payroll, Forms, Affiliates, and Faculty Status. The Reports section is active, showing a Report Type dropdown set to Salary Alignment Report. The report displays a table with columns for Position Competency, Employee ID, Employee Name, FTE, 1.0 FTE Salary, Comparison R., Gender, Employee Age, Ethnic Group C., HR Status Des., Range Minimum, Market Rate, Range Maximum, ECA Code, and ECA. The 1.0 FTE Salary column is highlighted with a red arrow.

Position Competency	Employee ID	Employee Name	FTE	1.0 FTE Salary	Comparison R.	Gender	Employee Age	Ethnic Group C.	HR Status Des.	Range Minimum	Market Rate	Range Maximum	ECA Code	ECA
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Student Administration – Update to the Major Academic Plan Filter

The Major Academic Plan filter drop down has been updated on the Degree Candidates report and the Degree Recipients report to make it easier to use. This update is similar to the update that was made on the Term Enrollment report in May.

Degree Candidates report

Term Enrollment | Degree Candidates | Degree Recipients | Reports

Term Code From: 2019 Summer II (2194) Term Code To: 2019 Summer II (2194) Search Clear

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

Expected Graduation Term Code: Show 25 entries Showing 0 to 0 of 0 entries

Major Academic Plan Filter:

- ☐ Arts & Sciences
- ☐ Provost
- ☐ Sch Business
- ☐ Sch Dentistry
- ☐ Sch Education
- ☐ Sch Govt
- ☐ Sch Info & Lib
- ☐ Sch Pub Health
- ☐ Sch Journalism
- ☐ Sch Law
- ☐ Sch Medicine
- ☐ Sch Nursing
- ☐ Sch Pharmacy
- ☐ Sch Social Work

Table Headers: PID, Name, Degree, Checkout Status, Maj Acad Plan Cd, Maj Acad Plan Dt

No data available in table

Online Help Request | Feedback

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Degree Recipients report

Term Enrollment | Degree Candidates | Degree Recipients | Reports

Term Code From: 2019 Summer I (2193) Term Code To: 2019 Summer I (2193) Search Clear

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

Completed Term Code: Show 25 entries Showing 0 to 0 of 0 entries

Major Academic Plan Filter:

- ☐ Arts & Sciences
- ☐ Provost
- ☐ Sch Business
- ☐ Sch Dentistry
- ☐ Sch Education
- ☐ Sch Govt
- ☐ Sch Info & Lib
- ☐ Sch Pub Health
- ☐ Sch Journalism
- ☐ Sch Law
- ☐ Sch Medicine
- ☐ Sch Nursing
- ☐ Sch Pharmacy
- ☐ Sch Social Work

Table Headers: PID, Name, Degree Code, Cum. GPA, Degree Conferal Date, Degree Honors, Maj Acad Plan Cd

No data available in table

Online Help Request | Feedback

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Student Administration – Two New Fields Can Be Exported on the Degree Recipient Report

The Degree Recipients report now has two new fields, the Cumulative Degree GPA and the Cumulative Degree Units, available to be included when you export the report to Excel.

Term Enrollment | Degree Candidates | Degree Recipients | Reports

Term Code From: 2019 Summer I (2193) Term Code To: 2019 Summer I (2193) Search Clear Advanced

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

Completed Term Code: Show 25 entries Showing 0 to 0 of 0 entries

Table Headers: FERPA Flag, PID, Name, Degree Code, Cum. GPA, Degree Conferal Date, Degree Honors, Maj Acad Plan Cd, Maj A

No data available in table

Online Help Request | Feedback

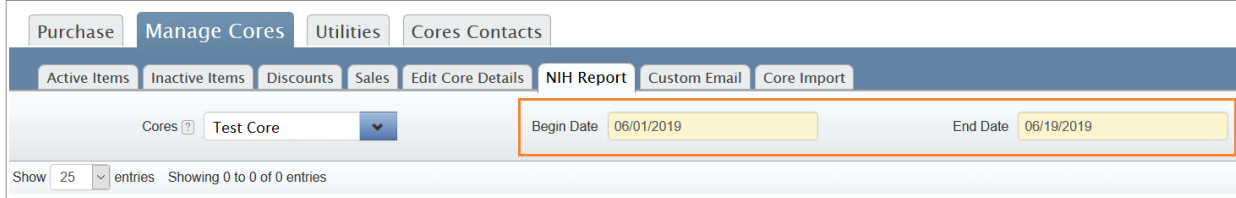
Export Fields:

- ☐ (show all)
- ☐ Contact Info
- ☐ Academics
 - ☐ Degree Conferal Date
 - ☐ 1st Major Subplan
 - ☐ 2nd Major Subplan
 - ☐ 1st Minor
 - ☐ 2nd Minor
 - ☐ Certificate Major
 - ☐ Major 1 Honors Code
 - ☐ Major 2 Honors Code
 - ☐ Cum. Deg. GPA
 - ☐ Cum. Deg. Units
- ☐ Demographics

Cores – NIH Report

The Cores NIH Report by default pulls data from the beginning of Infoporte in 2012. This data reaches back to legacy (FRS) data and is causing extra processing when most of the time we won't need data from that far back.

By adding a date filter that defaults to the previous month the report will take less time to load.



The screenshot shows the 'Manage Cores' section of the InfoPorte system. The 'NIH Report' tab is selected. Below the tabs, there is a search bar with 'Test Core' entered. To the right of the search bar, the 'Begin Date' is set to '06/01/2019' and the 'End Date' is set to '06/19/2019'. These date fields are highlighted with an orange border. At the bottom left, it says 'Show 25 entries' and 'Showing 0 to 0 of 0 entries'.

Cores – Sales Report

In the Sales report, the Payment Details column that appears online has been added to the excel export as well. This field displays the account if paid internally via a Chartfield or it displays a Purchase Order number if paid by that method.