



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Tableau School Reports Overview

SAS VA to Tableau Conversion

CAS Business Operations Lunch & Learn

March 26, 2021

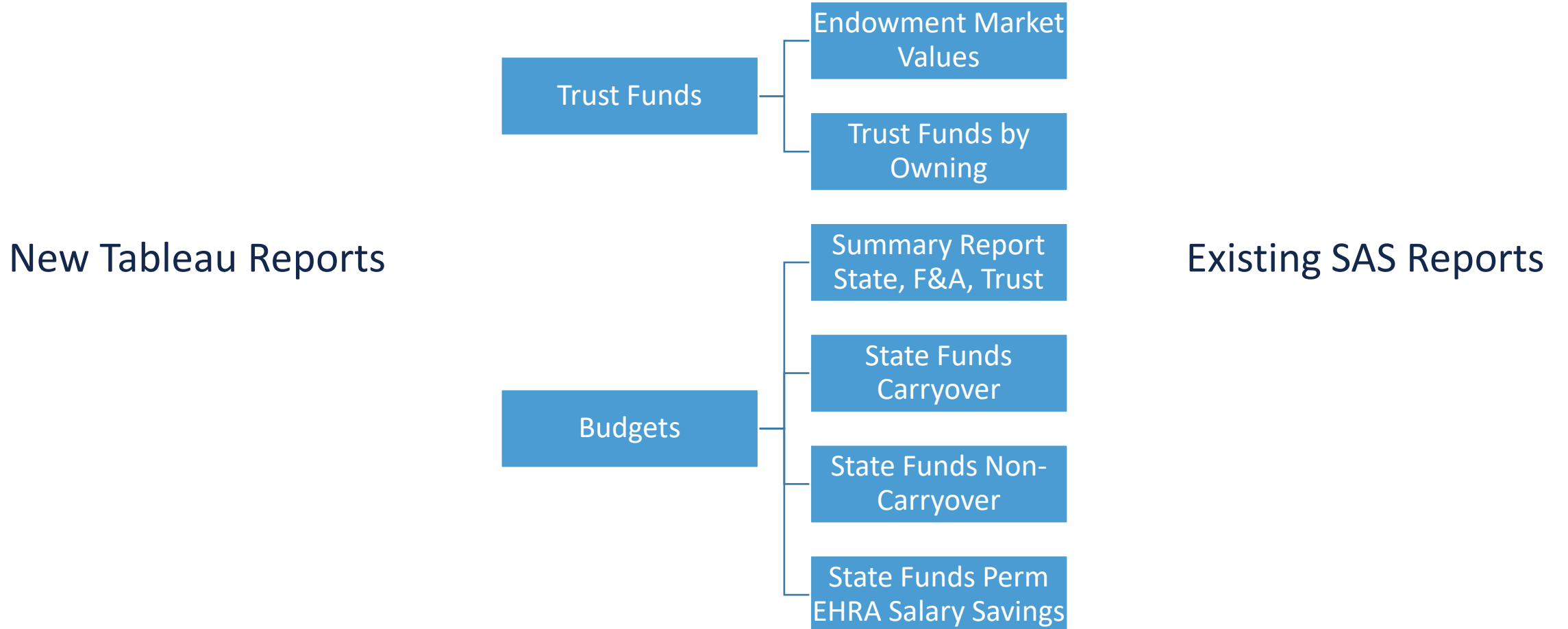
College of Arts & Sciences
Synergy Unleashed

Agenda

- Report structure changes
- Access portals
- How to get access
- Demonstration
- Rollout timeline
- Questions

STRUCTURE CHANGES

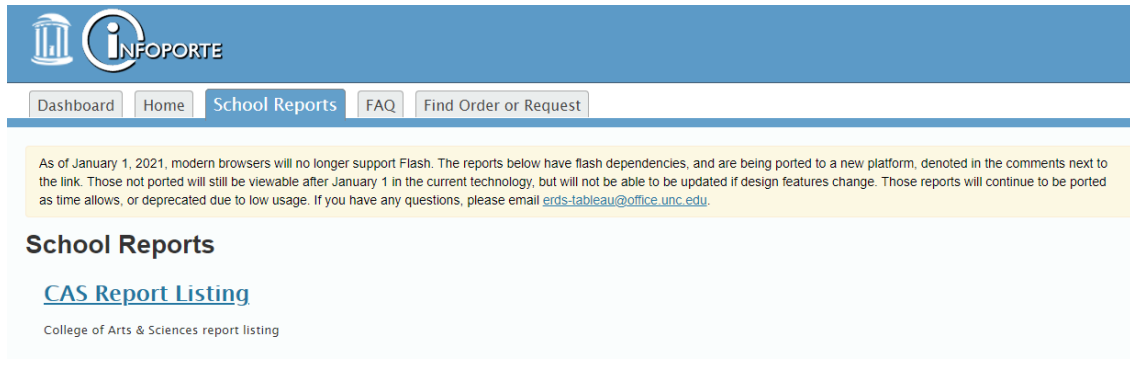
Mapping current reports to new reports



ACCESS PORTALS

Where to find the new reports

Infoporte, School Reports tab



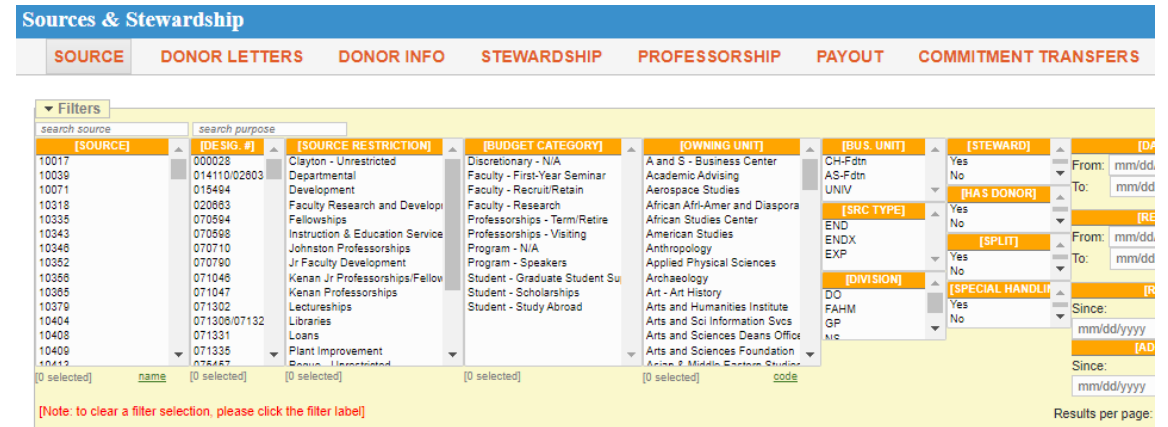
The screenshot shows the Infoporte website header with the logo and navigation tabs: Dashboard, Home, School Reports, FAQ, and Find Order or Request. Below the navigation is a yellow notice box stating: "As of January 1, 2021, modern browsers will no longer support Flash. The reports below have flash dependencies, and are being ported to a new platform, denoted in the comments next to the link. Those not ported will still be viewable after January 1 in the current technology, but will not be able to be updated if design features change. Those reports will continue to be ported as time allows, or deprecated due to low usage. If you have any questions, please email erds-tableau@office.unc.edu."

School Reports

[CAS Report Listing](#)
College of Arts & Sciences report listing

Infoporte -> Home -> School Reports

Sources system



The screenshot shows the "Sources & Stewardship" system interface. It features a top navigation bar with tabs: SOURCE, DONOR LETTERS, DONOR INFO, STEWARDSHIP, PROFESSORSHIP, PAYOUT, and COMMITMENT TRANSFERS. Below the navigation is a "Filters" section with a search bar and a table of source data. The table has columns for [SOURCE], [DE SIG. #], [SOURCE RESTRICTION], [BUDGET CATEGORY], [OWNING UNIT], [BUS. UNIT], [STEWARD], and [D]. The table contains several rows of data, including source numbers like 10017, 10039, 10071, 10318, 10335, 10343, 10346, 10352, 10358, 10385, 10379, 10404, 10408, 10409, and 10412. The interface also includes dropdown menus for [SRC TYPE], [DIVISION], and [SPECIAL HANDLING], and date pickers for [From] and [To].

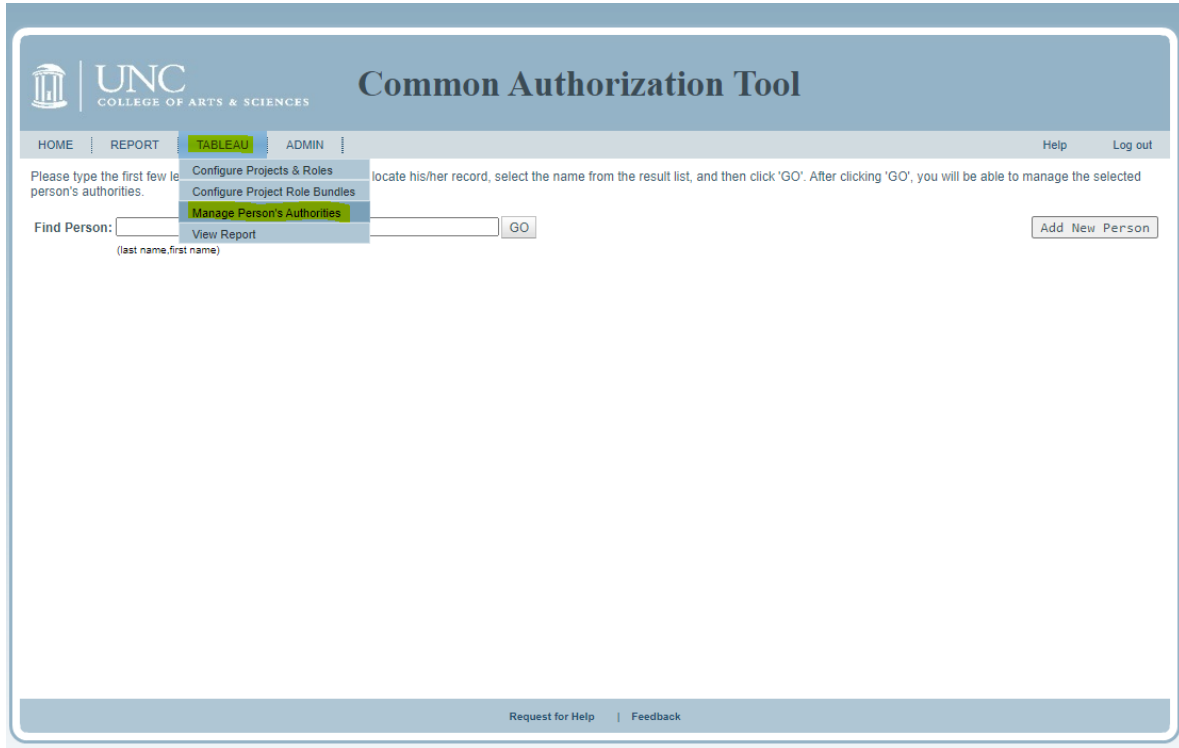
[Note: to clear a filter selection, please click the filter label]

Results per page:

srcs.oasis.unc.edu

GETTING ACCESS

How to give department staff access



The screenshot shows the 'Common Authorization Tool' interface for UNC College of Arts & Sciences. The navigation menu includes HOME, REPORT, TABLEAU, and ADMIN. The TABLEAU menu is expanded, showing options like 'Configure Projects & Roles', 'Configure Project Role Bundles', and 'Manage Person's Authorities'. A search bar labeled 'Find Person:' is present with a 'GO' button. The 'Add New Person' button is also visible.

cat.oasis.unc.edu

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Manage Person's Tableau Project Authorities

Please type the first few letters of a person's of last name to locate his/her record, select the name from the result list, and then click 'GO'. After clicking 'GO', you will be able to manage the selected person's authorities.

Find Person:
(last name,first name)

Selected: Joseph Daley, onyen: jjdaley, PID: 720396702

To add a role, select BOTH a unit and role value, click the green plus sign, and then click 'Save.' Optionally, you may update the start date, and/or add an end date for the authority saving.

Available Authority	Granted Authority
ALL	
A and S - Business Center	
Academic Advising	
Aerospace Studies	
African Afri-Amer and Diaspora	
African Studies Center	
American Studies	
Anthropology	
Applied Physical Sciences	
Archaeology	
Art - Art History	
Arts and Humanities Institute	
Arts and Sci Information Svcs	
Arts and Sciences Deans Office	
Arts and Sciences Foundation	
Acknowledgement Letters : Department	
Business Operations - Finance Reports : Viewer	
Commitment Transfers : Unit Viewer	
IP Tracker : Explorer	
OASIS Production : Viewers	
OCS : Viewers	
Payout Process : Unit Editor	
Test Project #1 for AD Sync : Unit Viewer	
Undergraduate Education - ISS : Viewers	
Undergraduate Education - Student Success : Creator	
Undergraduate Education - Student Success : Explorer	
Undergraduate Education - Student Success : Viewer	

New Authority Start Date*: End Date: (optional)

SRCS.OASIS.UNC.EDU

Demonstration



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TIMELINE

When will the new reports be live

- New reports will be available in Sources by 4/12
- SAS reports will remain available through Infoporte portal until 5/1
 - After 5/1, the Infoporte – School Reports portal will point to Tableau reports

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