WRS - Summary of Changes in the new Wolfpack Reporting System

WRS has been redesigned with new opportunities, this document provides a summary of the changes.

New Menu

Report Guide

WRS Report Name	WRS 2.0 Report Name
1-Fiscal Year to Date Financial Status	P1-Financial Balances by Project
2-Project to Date Financial Status	P1-Financial Balances by Project
3-Cash Balance	P2-Cash Balances by Project
4-Financial Status	P1-Financial Balances by Project
5-Financial Summary Status	P1-Financial Balances by Project
6-Summary by Project Phase	C1-Financial Status by Chartfield
7-Summary by Project Segment	C1-Financial Status by Chartfield
8-Project to Date Budget Expense Summary	P1-Financial Balances by Project
9-Detailed Project Expenditures	C2-Journal Transactions by Chartfield
10-Detailed Project Encumbrances	C2-Journal Transactions by Chartfield
11-Detailed Payroll Expenditures	P3-Detailed Payroll Transactions by Project
12-Detailed Payroll Encumbrances	P3-Detailed Payroll Transactions by Project
13-Three Month Comparison	Eliminated
14-Chartfield Specific Balance by Account	C3-Chartfield Specific Balance by Account
15-Fiscal Year to Date Center/Institute Status	M1-Center/Institute Status
16-Fiscal Year to Date Auxiliary Status	M2-Auxiliary Status
18-Summary of Projects by Principal Investigator	M3-Summary of Projects by Principal Investigator

Other Menu Changes:

1. The Helpful Links have been moved from the bottom of the menu to the top right hand side.
2. All users receive the same preferences the first time they log in.
3. Hover text is available over the radio button with references to the previous WRS Reports.

<u>**Highlights by Report**</u>

P1-Financial Balances by Project

1. Used for all Fund Sources
2. Account column always displays
3. It renders based on the Fund Source
4. New functionality to Add/Remove Personnel Encumbrances, Show/Hide Prior Month, Show/Hide Quarter Balances, Show/Hide FYTD Balances, and Show/Hide PTD Balances
5. At the Account Range Row, you can expand to see balances at the individual account level.
6. Project Attributes shown are based on the Fund Source

P3-Detailed Payroll Transactions by Project

1. Combines the Payroll Expenditure & Encumbrance Data in one report.
2. Salary and Benefits Data appear side by side by employee.
3. Includes a table summary of HR Payroll Transactions by Category.
4. If the employee has multiple Earnings for a particular Project ID, staff benefits will be displayed with the first one listed.
5. Pay drilldown now includes the Project ID and Account.

C1-Financial Status by Chartfield

1. Report allows you to run by Project Reference or Segment and by Chartfield Combinations such as Department and Funding Group or Department and Project ID to see balances at the Project ID level.
2. Includes a column for Revenue
3. Includes additional fields for analysis such as Funding Group and Chartfields.
4. Project ID is a link and when clicked runs the P1 Report.
5. No additional drilldowns available.

C2-Journal Transactions by Chartfield

1. Report allows you to run by Project Segment or Phase or by Chartfield Combinations such as Department and Account or Department, Project and Account to see Journal Transactions for different types such as Budget, Actuals, or Encumbrances.
2. Journal transaction can be pulled for a specific month or as of a specific month.

P1-Journal Drilldown and C2-Journal Transactions by Chartfield

1. New column for vendor name
2. New columns for account categories
3. Student drilldown now opens in Student Financials.
4. Marketplace Drilldown now opens in Financials System.
5. Pcard Drilldown now opens in Financial System.
6. Fleet card Drilldown now opens in Financial System
7. Journal ID are now a link and opens in Financial System.
8. PMR's(budget), Bill Invoices, Vouchers, IDT's are now links and open in Financial System.

Other Notes:

1. Download to Excel was changed to WYSIWYG (What You See Is What You Get), except when the data download is over 2 million bytes then its uses the template download method which may take a few more seconds.
2. For P2, C3, M1, M2 and M3 did not have any changes.
3. The journal drilldown does not contain the new features for reports P2, C3, M1 and M2.
4. For M3, when you click on the Project ID, it runs the P1 report.