Initial Report

Last Modified: 05/29/2014

1. The Wolfpack Reporting System Rewrite Committee was formed to meet with the campus community to gather information about how the Wolfpack Reporting System (WRS) is used today and how it can be improved to better meet the needs of campus. The main goal of the WRS Rewrite project is to address the current performance issues related to running reports and using the drill downs, with additional goals of removing reports no longer being used and exploring future enhancements and reports. In an effort to capture feedback from campus, the committee conducted 3 separate Town Hall meetings. In addition, the committee would like to provide another opportunity for campus to provide input by asking WRS users to complete the following short survey. We will use the results of the surveys, together with the information gathered from the Town Hall meetings, to begin Phase 1 of the WRS Rewrite project. Phase 1 will consist of: (a) improving the current performance issues, (b) removing reports that are no longer being used, and (c) implementing those report changes which are most value added (based on campus feedback) and which can be realistically done with existing resources. Phase 2 of the project will consist of implementing changes that are more resource intensive and creating new reports as resources are available. Again, the following survey is very brief and should take a maximum of 5 minutes to complete. However, your feedback is critical to ensuring WRS best meets the reporting needs of campus.Please provide your name, department, and phone number so that we can contact you if we have questions or need more information about your feedback.

First Name	Last Name	Department Name	Phone Number
Cassandra	Campbell	Office of Cost Analysis	919-515-7490
Deborah	Murphy	Foundations Accounting & Investments	919-515-1003
dawn	piercy	CALS Business Center	919-515-6373
Lori	Wilson	New Student Orientation	919-515-1234
Donn	Gaddy	Insurance & Risk Management	919 515 6135
Barbara	Yde	DELTA	919-515-8926
Patrick	Hayes	COE-Office of Research Administration	919-515-7009
Dawn	Wilkins	The Ergonomics Center	919-515-8132
Richard	Duckworth	COE-ORA	919-513-0414
Teresa	Sauls	CNR	919-513-1253
Kathleen	Berding	CBE	919-513-2177
Corrinda	Watkins	Human Resources	919-515-4271
NIcole	Dahlke	Forest Biomaterials	9195155749
Jennifer	Williams	Mathematics	919-515-0665
Roxie	White	CALS Business Center	919-513-1796
Ann	Hunt	Computer Science Dept	919-513-7300
Christine	Franek	Civil, Construction and Environmental Engineering	919-515-4583
Patricia	Cravotta	CVM - Business Office	919-513-6419
Beth	Graf	MEAS	919-513-2570
Joanna	Carter	Human Resources	919-515-4286
Jennifer	Warrillow	MEAS	919-515-3459
Miki	Baggett	College of Vet Med - admin	919-513-6276
Pam	Wells	AEE	9195152707
Lori	Johnson	Treasurer	919-513-0748
Ken	Ingraham	Transportation	919-513-2740
Elaine	Emory	MSE	919-515-8109
Michele	Gurkin	University Advancement	919-515-7134
Deborah	Harvey	Office of General Counsel	919-515-1999
Alan	Porch	Mathematics	919-513-2294
Amber	Polk	Horticulture	919-513-3924
Linda	Lancaster	ITRE	919-515-8563
Asia	Gray-Battle	NSF ASSIST Center	919-515-1450
Sandra	Patterson	Controller's Office	919-515-7460
Kim	Jett	Sandhills & Upper Piedmont Research Station	910-974-4673
Lisa	Wiley	SAT	919-513-3111
William	McCallum	CHASS	919-515-1705

Deanna	Osmond	Soils	919-515-7303
Amy	Grubbs	Onboarding Center	919-513-1353
Maria	Brown	University Cashier's Office	919-515-9762
Pat	Flanary	Transportation	919-515-8000
Chris	Buchanan	Graduate School	919-515-4472
Jeff	Gillikin	Plant and Microbial Biology	919-515-0479
linda	pistole	caat	919-515-8446
Stephanie	Jackson	College of Education	919-513-7654
Chanelle	Corpening	Facilities Operations	919-515-9837
Ginny	King	Contracts &Grants	919-513-2391
Saundra	Doby	Chemical & Biomolecular Engineering	919-515-3999
Carlos	Rivera	College of Sciences Business Office	919-515-7141
Heather	Stiles	Industrial Extension Service	919-205-1259
Laura	Schenkman	Biotechnology Program	919-515-4230
Holly	Durham	Division of Academic & Student Affairs	919-513-1821
Krystal	Baker	Student Publications	919-513-0362
Ryan	Boyles	State Climate Office	919-513-2816
Caroline	Pennington	Office of Contracts and Grants	9195137290
Marquya	Crawford	Contracts and Grants	9195158016
Taylor	Jeffreys	University Advancement	919-515-0506
Kathy	Green	Institute for Advanced Analytics	919-513-3940
Dusty	Fletcher	Crafts Center	919.513.3614
Arlene	Mabry	Athletics	919-515-3050
Debbie	Saunders	Forest Biomaterials	919-605-5897
Ryan	Wood	Facilities Budget Office	919-515-2819
Suzanne	Crews	Student Development, Health, and Wellness	9195137513
Christy	Rain	ARTS NC STATE	919-513-1820
Karen	Rackley	University Controller's Office	919-515-7094
Delores	Pulliam	Contracts and Grants	9195137289
Kathleen	Roth	Statistics	9195151903
Denise	Hall	Internal Audit Division	919-515-8864
Beverly	Armwood	Athletices	919-515-3050
Dawn	Crotty	LPAHE (College of Education)	919-515-6289
Gail	Gregory	Office of Information Technology; Business Services	919-513-0575
Bessie	Bukhay	Career Development Center	919.515.4418
Meghan	Griffith	Contracts & Grants	9195158014
Susan	Peaslee	C&G	919-515-8013
Suzanne	Brubaker	Contracts & Grants	919-515-3742
Sharon	Wright	Nonwovens Institute	919-513-0908
Robin	Hughes	FER	9195157561
Shawn	Senter	Cooperative Extension	336-593-8179
Randy	Jones	MCE & CE	919-515-2144
Shawn	Smith	Enrollment Management and Services	919-513-3515
Kina	Morgan	Textiles Dean's Office & Staff	919-515-6641
Jane	Smith	College of Education	919-513-7211
Mike	Haskins	Textiles-Business Office	919-515-2439
Marian	McCord	TECS	9195156571
Jimei	Wang	The Nonwovens Institute	919-515-6582
leslie	beddingfield	csleps	919-515-9248
Honora	Eskridge	NCSU Libraries	919-515-6120
Dottie	Haynes	College of Design	919-515-8305
gail	liston	tpacc	919-515-6550
Chris	Terwilliger	CICE	919-515-1774
Virginia	Teachey	College of Engineering	919-515-3994
Lorraine	Spitzfaden	DASA	919-513-1566

Jan	Henderson	Institutional Research and Planning	919-515-6431
Amanda	Holbrook	Textile Engineering, Chemistry & Science	9195156638
Jonas	McCoy	College of Design	919-515-3785
Matt	Wilson	Controller's Office	919-513-0690
Ashley	Chilton	Campus Life	919-515-4401
Jill	Tasaico	FAI	919-515-1001
Shelia	Fisher	Nonwovens Institute	919-513-7699
Mindy	Huffman	Laboratory for Analytic Sciences	919-515-6084
Becky	Hupp	Molecular Biomedical Sciences	919-513-6435

This table has more than 100 rows. Click here to view all responses

Statistic	Value
Total Responses	153

2. When working in WRS, which browser(s) do you more frequently use (Select all that apply)

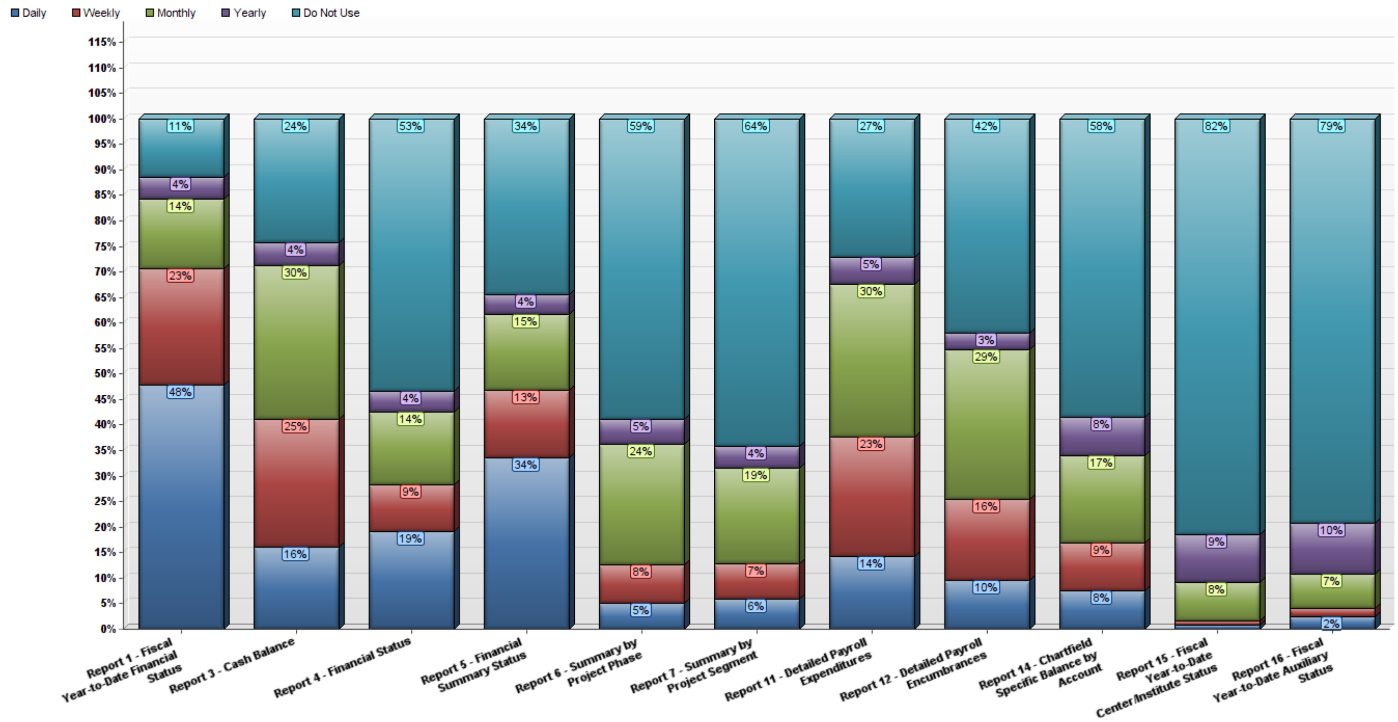
#	Answer	Bar	Response	%
1	Google Chrome (specify version):		67	46%
2	Internet Explorer (specify version):		68	47%
3	Mozilla Firefox (specify version):		67	46%
4	Other (please specify):		2	1%

Google Chrome (specify version):	Internet Explorer (specify version):	Mozilla Firefox (specify version):	Other (please specify):
		do not know	
35.0.1916.114 m	10	29.0.1	
Version 35.0.1916.114		29.0.1	Chrome mobile 35.0.1916.122
Version 35.0.1916.114 m		29.0.1	
	Internet Exp 11	Firefox - 29.0.1	
	10.0.9200.16866	29.0.1	
newest		on occasion, newest	
35.0.1916.114		29.0.1	
35.0.1916.114 m		29.0.1	
		current	
Version 35.0.1916.114 m	10	18.0	
35.0.1916.114 m		29.0.1	
	11.0.9600.17107	29.0.1	
		29.0.1	
		100%	
	11.0.8	29.0.1	
		29.0.1	
	11.0.9600.17107	29.0.1	
If IE isn't working	Most Often	If Chrome and IE aren't working	
		29.0.1	
	11.0	29.0.1	
Version 35.0.1916.114 m		29.0.1.5239	
(latest)		(latest)	
network OIT copy	network OIT copy	network OIT copy	
?			
Version 35.0.1916.114 m			
Latest	11.0		
35	IE 11		
not sure			
version 35			
36.0.1985.32 (Mac)			Safari (Mac) 7.0.4
35.0.1916.114 m	11		
65.72.60			
35 (it auto updates with every new version)			
35.0.1916.114			
35.0.1916.114			
35.0.1916.114 m			
35.0.1916.114 m			
35.0.1916.114	11.0.8		
Vers 35 Mac OS			
35			
	11		
	11.0.9600.16663		
	11		
	Version 10		

	Explorer 11		
	11		
	10		
	IE Version 11		
	11		
	11		
	don't know		
	11		
	11.0.9600.17107		
	Version 11.0		
	?		
	11		

Statistic	Value
Min Value	1
Max Value	4
Total Responses	146

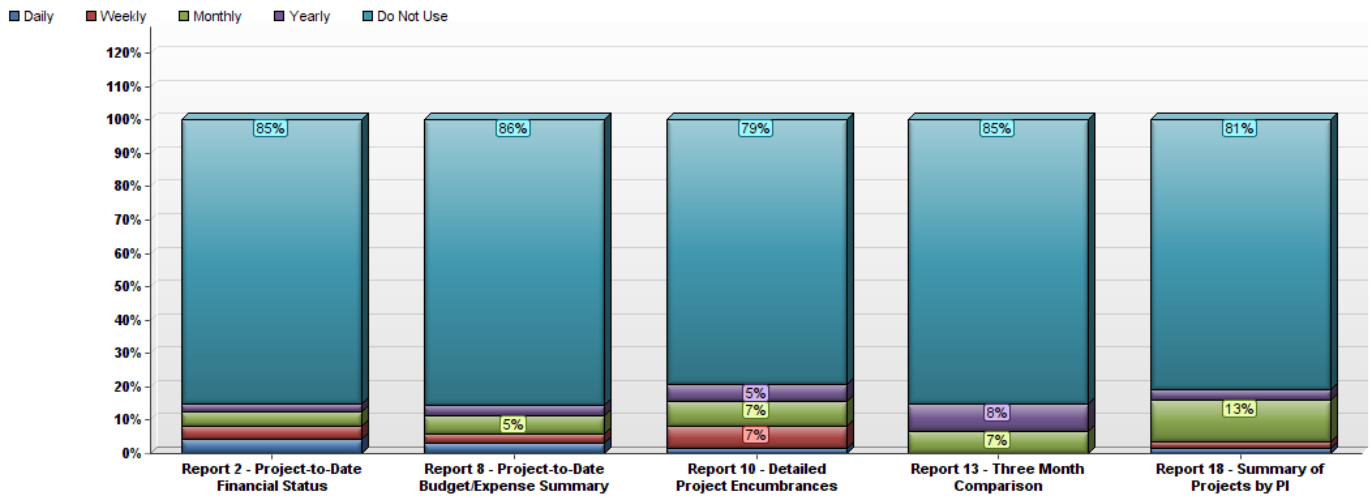
3. How often do you use the following reports:



#	Question	Daily	Weekly	Monthly	Yearly	Do Not Use	Total Responses	Mean
1	Report 1 - Fiscal Year-to-Date Financial Status	67	32	19	6	16	140	2
2	Report 3 - Cash Balance	22	34	41	6	33	136	3
3	Report 4 - Financial Status	23	11	17	5	64	120	4
4	Report 5 - Financial Summary Status	43	17	19	5	44	128	3
5	Report 6 - Summary by Project Phase	6	9	28	6	70	119	4
6	Report 7 - Summary by Project Segment	7	8	22	5	75	117	4
7	Report 11 - Detailed Payroll Expenditures	19	31	40	7	36	133	3
8	Report 12 - Detailed Payroll Encumbrances	12	20	37	4	53	126	4
9	Report 14 - Chartfield Specific Balance by Account	9	11	20	9	69	118	4
10	Report 15 - Fiscal Year-to-Date Center/Institute Status	1	1	9	11	97	119	5
11	Report 16 - Fiscal Year-to-Date Auxiliary Status	3	2	8	12	96	121	5

Statistic	Report 1 - Fiscal Year-to-Date Financial Status	Report 3 - Cash Balance	Report 4 - Financial Status	Report 5 - Financial Summary Status	Report 6 - Summary by Project Phase	Report 7 - Summary by Project Segment	Report 11 - Detailed Payroll Expenditures	Report 12 - Detailed Payroll Encumbrances	Report 14 - Chartfield Specific Balance by Account	Report 15 - Fiscal Year-to-Date Center/Institute Status	Report 16 - Fiscal Year-to-Date Auxiliary Status
Min Value	1	1	1	1	1	1	1	1	1	1	1
Max Value	5	5	5	5	5	5	5	5	5	5	5
Mean	2.09	2.96	3.63	2.92	4.05	4.14	3.08	3.52	4.00	4.70	4.62
Variance	1.82	1.92	2.65	2.91	1.59	1.64	1.95	2.00	1.83	0.52	0.77
Standard Deviation	1.35	1.39	1.63	1.71	1.26	1.28	1.40	1.41	1.35	0.72	0.88
Total Responses	140	136	120	128	119	117	133	126	118	119	121

4. We are proposing to eliminate the following reports. Please specify how often you use these reports.



#	Question	Daily	Weekly	Monthly	Yearly	Do Not Use	Total Responses	Mean
1	Report 2 - Project-to-Date Financial Status	6	5	6	3	115	135	4.60
2	Report 8 - Project-to-Date Budget/Expense Summary	4	4	7	4	114	133	4.65
3	Report 10 - Detailed Project Encumbrances	2	9	10	7	106	134	4.54
4	Report 13 - Three Month Comparison	0	0	9	11	115	135	4.79
5	Report 18 - Summary of Projects by PI	2	3	17	4	110	136	4.60

Statistic	Report 2 - Project-to-Date Financial Status	Report 8 - Project-to-Date Budget/Expense Summary	Report 10 - Detailed Project Encumbrances	Report 13 - Three Month Comparison	Report 18 - Summary of Projects by PI
Min Value	1	1	1	3	1
Max Value	5	5	5	5	5
Mean	4.60	4.65	4.54	4.79	4.60
Variance	1.09	0.88	0.99	0.30	0.81
Standard Deviation	1.05	0.94	0.99	0.55	0.90
Total Responses	135	133	134	135	136

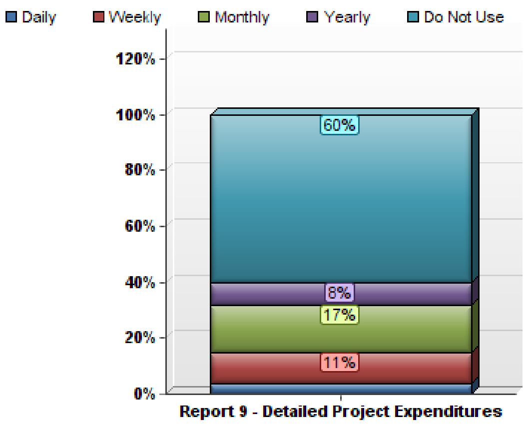
5. Please provide details on the impact to you or your office on any of the reports above that are used.

Text Response
Do not use, so no impact on my office if the reports are eliminated.
Report 2: check 2010 line item Report 10: check when rebudgeting and/or including as a reconciled item
I use report 18 to help a PI link the FAS to a name when they come in to chat and don't remember the account number.
My PIs use Project 8. I'm OK with eliminating it, but would just like the time to communicate with them how to use Report 5. They should be asked about it. I don't know what else they use.
Faculty seem to like and use Report 8 often. It makes things simpler for them. I use report 18 always. It helps to narrow down projects. It is less time consuming than going through chartfield to look up project numbers for PIs. The rest I never use.
not used
I use report 8 as I like the detail of expenses - supplies, services. It also breaks down the salaries quicker, I can know if it is temp labor, grad , etc Report 5 lumps salaries together. I also like the fact that Report 8 has a "current month activity" that Report 5 does not have. For someone in charge of HR and balancing account - Report 8 screen is just quicker for me , with the data. Report 10, does not have any detail that is of assistance -- I need specific names I use report 13
Report 18 is extremely useful to us on a daily basis. Not only can we pull it up as a snapshot when we need to look at one PI's current projects, we use it monthly for our internal monthly reports. I, personally, use this report at almost every meeting I have with the PIs and with our dept head when reviewing faculty members current projects.
I use report 18 to make sure I have all the projects from my PI on my spreadsheet. My PI has A LOT of grants, and this is the best way I have found to make sure I have them all under control. Please do not remove this report.
NCDOT requires quarterly reporting by our PI's. Many utilize the 3 month comparison to complete the reporting as do I.
This will not cause a great impact
I can easily find a workaround if you get rid of any of the reports above.
None of these reports are used.
My PI uses Report 8 (at least monthly, if not weekly). I cannot speak to the impact on them.
I don't use any of the above reports so it would have no impact on me if they were removed.
No impact, the information provided by these reports is currently obtained from queries.
No impact
Report 8 is my default report to use first! Please don't take it away!
There would be a small impact without Report 13, but I could compile the figures on my own.
No impact for me.
I only use Report 4 and I am not sure which reports the other people in my office currently use.
I don't use these not have I been instructed about these reports.
n/a
No impact since we do not use these reports
REPORTS 1, 3 AND 11 ARE USUALLY DAILY AND ARE OF GREAT USAGE AND SUPPORT IN MY DAILY WORK.
As long as I can see my Fiscal-Year-To-Date Reports, I am good to go.
provides up to date account information and projected account information used for budget management and control.
I rarely if ever use the reports listed above.
Report 2 is the primary query to identify all equipment line charges on a given project to match to AM for C&G close outs. As well it is used to verify the inclusion of all charges for fabrications.
N/A
Report 8 - Project-to-Date Budget/Expense Summary: I use this constantly to update PI's on budget status and expense details for 30 different projects.
Report 10 contributes to an in-house monthly report. It is very helpful, and would be missed. Report 18 is helpful, as my position will soon include grants. I have been using this report to familiarize myself with the grants awarded in my department. I may not use this as often, going forward.
The only report I ever use is Report 1 - Fiscal Year-to-Date Financial Status. There would be no impact to me if any of the other reports were eliminated.
None
None
These reports are rarely pulled - mostly look at labor queries.
Report 8 is the most useful. It would be a stupid idea to get rid of that one. For some reporting to funding agencies, that is the only report that provides the needed info.
I use report 10 to track expenses of phases on accounts.
I regularly use Report 18 to find what projects a current PI has available. I do not like that the report is not always accurate (for whatever reason). Many times, some of the grants have expired but still show up as active years later. Would a new report be available to show all grants for each PI if this one is removed?
I find it useful to compare operating expenses month to month to see if expenses are fairly even or spike during certain months. Then I can determine why and see if they are one time costs or costs I need to budget month to month.
Reports 5 and any others that are used frequently to view financial information on 5-ledger projects are vital to daily monitoring of contracts and grants. Report 5 especially is used on a daily basis to monitor and track budgets and expenses. Payroll and encumbrance reports are also used on a daily basis to assist in the monitoring of contracts and grants. It would be helpful to add the account code to payroll reports.
Please not that I only recently started using WRS on a daily basis, as I am fairly new to this position. There may be some reports here that are used by some of my co-workers that I have not yet learned to use.
tracking 30-40 grants and contracts, and the graduate student expenses

As you discussed, speed is the number one problem with Wolf. Any changes to reports, once speed is addressed, will be gravy. not sure how much data you have on report run times but to get back to main menu can be over 30 seconds. i use multiple browser versions to run add'l sessions to leap frog between reports. Report 5 is spectacular. i download to excel to use it for everything and use drill downs to look at monthly expenditures. Drill down capacity is main reason this is more useful than PI portal version; another reason is that the PI portal excel download of account snapshot doesn't bring in project header info. Main uses include: projecting salaries and expenses for closeout, adding columns to calculate budget revisions/supplements needed, finding documentation for expenditures. For project review, I use in conjunction mainly with reports 11 and 12, though lately 11 is getting superceded by pi portal personnel tab which is great. Rept 12 still useful. Report 4 is good for figuring out how much sponsors have paid to date on a project (figure out if they have paid a given invoice etc, or with LOC projects how much was paid). Somewhere, i am not sure where, it would be excellent to see outstanding invoices but not sure WRS report is the venue. Report 18 is really nice in that it provides funding and expenditure data: much more informative than using grant admin version of PI Portal list projects for PI. However, neither option includes columns with end dates. (sorry but I use a shadow system to run monthly reports of projects where i can include budget and project end dates!); if report 18 included columns for those dates And/Or if PI portal list by PI included end dates and same columns as report 18 it would be BRILLIANT!!!!! we are all basically in triage mode so any possibly chance to show project end dates would save time to be able to review project closings three to six mo out or projects getting toward zero before others rather than going thru whole list would be helpful. When i use report 18 i download to excel and add end date column manually. Thanks for your hard work. Ending with what i said at beginning: Speed is the number one problem with Wolf. Any changes to reports, once speed is addressed, will be gravy. Number 2 big issue is getting faculty used to looking at wrs and pi portal on regular basis ?! thanks again, Wendy
These are necessary for project monitoring, however the reports are often so inaccurate to be useless or worse, misleading. WRS often does not reflect actions taken as much as 6 months earlier (salary redistributions, grad student graduating and coming off, JVs, etc.). The initial data entered also is sometimes wrong (grad student only proposed for 6 month period, encumberance shows full year, etc.)
I do not use these reports at all, but I am fairly new to the wolf reporting system. I would say my co-workers would use 2, 8, and 10, but not frequently.

Statistic	Value
Total Responses	46

6. We are proposing to re-purpose the following report to directly show you the same results as the journal drill down view. Please specify how often you use this report.



#	Question	Daily	Weekly	Monthly	Yearly	Do Not Use	Total Responses	Mean
1	Report 9 - Detailed Project Expenditures	5	15	23	11	82	136	4.10

Statistic	Report 9 - Detailed Project Expenditures
Min Value	1
Max Value	5
Mean	4.10
Variance	1.54
Standard Deviation	1.24
Total Responses	136

7. Please provide details on the impact to you or your office if this report was re-purposed.

Text Response
that would be helpful
No impact on my office if the report is re-purposed as the report is not used.
no impact
I'm not a fan of this style of report (looks like Report 11). I would probably continue not to use it.
Not much of an impact as I normally use Report 5
If I have drilldown capabilities in reports 1 & 5 why do I need this one?
I am not sure that it would since I do not use it. But others in my department might.
not used
I use report 8 more - current expenses. When I review all the grants - I do use report 9 , but just monthly
I use the drill down function all the time so this would be good as far as I know.
May begin using this report after it is re-purposed. Currently I drill down from Report 1.
I use this daily and monthly to provide detailed reports to other managers and the faculty members, as well as use it for our monthly reporting.
I dont understand what you are even proposing here.
I use this all the time to figure out project expenditures
Not of what the journal drill down view is. Report 9 is the way I am able track whether shipping charges are incurred on an order that do not show up at the time of ordering. This is also the only way I can track whether purchases using the CALS Business Center purchase authorization have been invoiced the correct amount, when they are paid (we have no other way of knowing), and whether the proper distribution is applied when using multiple projects.
I don't use any of the above report so it would have no impact on me if it was changed.
If the functionality is still there in other reports, then this can go away.
Use this report to provide backup for sponsors that require backup with invoices.
I don't use it now - but may start to do so in the future.
I do not use nor have I been instructed about this report.
n/a
Not for sure on the impact. I would have to see the final version to see if it would be of benefit.
None
N/A
As long as I can drill down on various account codes, I am happy to use another report.
assists in tracking expenditures
I rarely use this report.
N/A
I use this constantly to update PI's on expense details for 30 different projects.
Little impact. It's a nice report, and I use it occasionally, but the same information can be found in other reports.
I have never used this report, so re-purposing it will have no impact on me.
N/A
I use this to track expenses on phases for accounts.
None
As long as I can view detailed expenditures by transaction/date somewhere on WRS, I will be happy.
No major impact.
Although I've never used this report, I've compiled this information for reports using Report 1. This is a more expeditious method. We'll definitely use it in the future, especially if it is enhanced with drilled down data.
we use this to provide "cleaner" view of info to faculty. it is currently linked from pi portal to WRS, and as such is helpful when i am training faculty on PI portal to show that pi portal is just a feed from WRS. Would need other link between the two; probably a drill down on report 5 would suffice. but for faculty there is a lot of other info there they don't need or care about. What about a toggle view that hid all fields except (without the check boxes): Project ID Acct Posted Date Amt Reference Line Desc Image
it seems helpful
This report is very useful for tracking particular purchases on a given account, and would probably be alright if rolled into the purchases view for other reports. However, I think the biggest advantage of this report is that it allows you to see all the purchases on an account on a much broader scale (both time among time periods and purchase types). I think keeping this feature would be very useful.
Again, I am fairly new to the wolf reporting system so I cannot give a whole of feedback.
I can sort things by downloading off the WRS in Excell which will take a little time because I like the highlighted areas of division.

Statistic	Value
Total Responses	42

8. How often do you drill down to the Journal Detail View:

#	Answer	Bar	Response	%
1	Always		82	59%
2	Sometimes		48	35%
3	Never		9	6%
	Total		139	

Statistic	Value
Min Value	1
Max Value	3
Mean	1.47
Variance	0.38
Standard Deviation	0.62
Total Responses	139

9. Phase 1 will focus on improving the speed and performance of the WRS Reports. Other than performance, do you have any other issues or suggested improvements for WRS?

Text Response
Not at this time.
Being able to search by phase would help the CALS community more than you will ever know
No issues. Love WRS and will be glad once the performance issues are corrected.
For a long while I was unable to sort using the column headers. Recently I have been able to again and it is a much needed task. I would just like to make sure this does not go my the way side again. Performance is definitely #1.
All this time I thought it was pretty fast...so it will be interesting to see the speed increased
No
When you hit the back button while in report 5 it would be nice to stay in the same grant not move to the previous grant you had been working on. Eliminate payroll encumbrances as it is always unclear if encumbered to end of budget period or grant ending date...and we change the payroll so often it really is un needed. Drill to see who were paid directly per payroll instead of having to go to report 11.
Yes! I want to see project balances by account. If I need to know how much money is left in my grant in the summer salary line (for example), I have to break out Excel to enter all of the figures. To my knowledge, there's no report to show that to me. This seems like such an obvious one. Perhaps I'm overlooking some blatantly obvious report. If so, please let me know what it is. Also, I've always dreamed of having a link on Report 5 to the latest budget JUSTIFICATION for that project. I'd just settle for a link to the "documents" tab of that project in RADAR. And, I'd like to see all actions have image uploads. There's no reason I shouldn't be able to click on an image for a sub unit billing, JV, or anything else. If I have Report 11, I should get payroll backup, too, shouldn't I? At least a link to the job in PS HR...
I wish that there was a report just like report 5, but the front page would provide detailed budget and expenditure information for the detailed salary account codes. Our number 1 liabilty on our research projects is personnel costs. Everytime we provide a budget report to PI's we down load report 5 and customize the report to show budget, salary and encumbrances for for the salary line items. Please don't get rid of the encumbrance report....it is a great cross check between our internal encumbrance form and what the system reflects...and that report includes names. I can't tell you how much time it would save if report 5 could include detailed payroll information without having to drill down. Thanks!
If there were a way to combine a drilldown that would give you the ending balances per line item. i.e. PI Reg Salary budgeted - PI Reg Salary used = budget available. At the moment we have to do this manually in the salary lines.
Drill downs for service unit billings that have an automatic reconciliation
In Report 5, when I want to change to a different project than the one I am viewing, I type in the new project # in the box, than click on Rerun. If I hit Enter, I get the Excel download. That's kind of inconvenient, but not a big deal. It would be nicer if hitting Enter was the same as clicking Rerun.
I have actually been pleased , except for speed at times. I do have to log-in quite a bit though
Speed is my main problem. Other than that it works good.
No issues other than speed and performance. It is a great working tool and preferable to having to write and run queries all the time.
I believe this would be better improved if drilling down gave you more detailed results, instead of having to use payroll reports (for instance), we could drill down in report 5, payroll, and it list names. Same with encumbrances.
Would be nice if the voucher id in the reference column (report 1) would take you to the voucher. IDT's and JV's too
Being able to drill down
Is there a way to make the payroll information easier to review, I honestly don't remember the response in the townhall.
yes. I need to be able to run reports based on the life of my grants (5 accounts). My grants cross fiscal years so it is so annoying to have to go back to June 2013 then June 2012 then June 2011 to find what I need to. I also need some serious training on this system. I have been here 5 years and have never had any formal training. Just what I have pieced together and what other people have shown me. Please create training for intro, and higher level from an expert in this system.
We have tied together many images. Could we find a way to integrate a view of invoices sent out by Contract & Grants into the record? We receive many calls from funding agencies about the invoices they receive. It would be helpful if we could pull a copy of the invoices sent so we would be able to research and answer the questions. This would also make it easier for C&G as they wouldn't have to stop, go pull the file, and send us a PDF all the time.
Please provide recommendations on browser for best results. Add ability to enter project ID to "rerun" on Report 1 on the drill down screens (top left).
none
When reports are downloaded into excel, remove any leading spaces. Please and thank you!
In Report 1 to add a column for salary distribution changes done in HR but not processed through payroll and for the budget balance available to be reduced or increased by the appropriate amount. Currently salary distribution changes are only updated once a month when the payroll runs so if you do one shortly after the payroll runs you have to wait almost a month before you see the result of that salary distribution change reflected in Report 1.
Speed is the only concern and maintaining access to the data in Report 9 (see previous comment) If training is necessary for the journal drill down, I am fine with learning how to use it.
Add an option where once you are in one report that you can change which report you are viewing for that account without having to go back out to the main menu. For example, I pull up account 5xx5xx in report 4 but I need to view report 5 for the same account. Currently I have to go back to the main menu, choose, report 5, retype the account number, and wait for the report to run. It would be more efficient to have a drop down menu while in report 4 to choose which report to view next for this same account number without having to go back to the main menu and do the previously mentioned steps.
images of all charges to hit accounts
No.
Would love to be able to see the travel reimbursements as images in the WRS report drill down.
None
2 needs: 1. Users need to be able to choose which projects they see on their drop down list. Right now I see 30+ projects in my drop down list, many of which I am not responsible for, so they just get in the way. A project listing page that would allow the PI to put a checkbox beside projects they want listed by default, and used in their summary reports, would be most useful. By default, all newly added projects would appear. 2. Similarly, it would be nice to let the PI rename (or provide a supplementary description) with their project names in the drop down or in the reports. The names assigned based on the proposal title is not very useful, and some PIs have 15+ projects and can't remember all the account numbers. It seems these might be simple options to add into the database lookup associated with the project ID, name, and description.
I would like to see queries and invoices generate quicker.
I find the WRS Reports are unsortable at times when using Firefox; consistent ability to sort with this browser would be helpful.

Ability to see images from SUB, UD, and other departments. But, I know this might not be possible depending on how other systems are established - but would be most helpful.

Need to be able to see info on Campus billing ie, Motor Pool, Telecom, facilities. In other words the billing that we do not have to approve at the dept/college level. Many times we are not given back up docs and it's incredibly hard to obtain.

In one of the town hall meetings it was mentioned that we may be able to have a direct link to a journal entry. I'd love this ability. I'd also like to be able to save Report 14 search parameters.

I wish the 6 accounts could have accurate codes/explanations to choose from so it was easier to check on accounts.

It's quite slow as stated above. WRS is quite useful other than speed.

I would like to be able to sort the results in other browsers other than Internet Explorer. When using Chrome of Firefox, I cannot sort by Posted Date. That's the only reason I use IE.

Add an option for Budget Templates that you could upload a template or spreadsheet to and that other offices might could use to manage their accounts. There is really no consistency on campus for Office Budget Reports that may be used to request increases or may be requested by Finance and Business.

I would like to add a couple of requests to the WRS list. 1 - Information downloaded into the description field of WRS from marketplace, Pcard, and purchase order numbers always lists the MK#, CPS #, or PO numerical number prior to the vendor. It would be great if the vendor would be listed first and then the numbers to make it easy to sort by vendor name. 2 - With frequent staff turnover, we are always recalculating our year end variance for salaries. Would it be possible to merge report # 10 and #11 to show payroll expenses and encumbered amounts? (I am not sure if there is some way to also include the original budget ... I believe the budget field in HR is updated every time a person is hired ... thus it changes to match the hiring salary.) I am attaching a copy of my vision of the report. 3 - There is a report for a 3 month comparison. Is it possible to get a report that shows a 3 year comparison (or 2 year comparison)?

Keep reports 1 and 3 and the drill down function on both. I use these 2 often. I like the download to Excel function. Overall, I'm fairly happy with it.

Change Orders and the date on the change orders Also; when the PO is carried over to the next fiscal year; it needs to stay the date of the actual PO instead of changing to 7/1

NO

Would like to be able to navigate to other reports while within another report.

Sometimes when using the arrow key I can enter a new project number and press enter and the system will pull up an older search that I did for a different project. So I have to remember to always compare the Heading with the project number I asked for or end up using the wrong data. WRS is always timing out, sometimes while you are drilling down to look at different expenses. Once it times out I always need to bring up a new window and log back in. If I try to go right back into WRS as the message suggests WRS will not work. Sometimes it would be very nice if you could view WRS in two seperate windows to compare data without the system getting confused.

No, I love WRS. I just wish it was faster. Its a great resource!

No!

I would like to see an improvement on IDTs. I see that they are entered online, but sometimes I cannot see what they are for. It would be nice to have some description (i.e., New and Aspiring CED Training). Too, it would be better if IDTs were actually done no later than the month or two following the event. One such instance of a bad-case scenario is that some of our IDTs did not come out of our account until SEVERAL MONTHS later. At that point, some of the agents could very well be over their limit when the IDT comes through.

speed only, of course you know that....

I create a number of monthly management reports for our Directors and it would be good to have consistent vendor fields. For example, voucher transactions have a different format than PCard transactions. We analyze our operating expenses by category and vendor so trying to pull this information gets a little tedious. If you want a few examples, please let me know.

No.

Would like more "point and open" options in cells, rather than having to copy and open in another tab.

none

It would be helpful if the WRS reports look like the budgets we submit into PINS, with the same categories, etc.

The main issue is the speed of the system. It is very frustrating at times.

Online tutorials for those users who aren't accounting professionals.

Combine report 11 - Payroll Expenditures and report 12 - Payroll Encumbrances Report to list approved travel authorizations by project (type of encumbrance report) In addition to WRS I use position control frequently. WRS is wonderful!

It would be nice to see CnG invoices. Some of our research sponsors require monthly technical reports to include financial information and copies of invoices. Currently, we have to contact CnG to request a copy of the invoice. It would be helpful to obtain these invoices via WRS drill down. It would also be helpful to see who is being paid from an account when in Report 5. You see payroll expenditures, but no name. Currently, one has to go out of Report 5 and into the detailed payroll expenditures to see who the people are.

in terms of "eye appeal" it would be helpful if some distinctions were made for the various parts of the report especially on the front page. . right now everything seems to blend and nothing POPS as you look at it.

No.

No improvement suggestions beyond increased speed.

I need training on what all the reports do to fully utilize the different reports.

None...

Voiced suggestions at Town Hall Meeting, no others at this time-Thanks!

Just speed and performance.

* Not all options work for all projects, and I never really know which one is appropriate for a given project type * For a PI with multiple projects, there are no easy ways to look at multiple projects at once * Many terms are not easy to understand to an end user -- for instance, I am often confused as to whether something was added or subtracted to my account What I would like to see: * Advancements in the new "For PI Researchers" option -- it has helped a lot in some of the issues above * Explanation of terminology and layout of reports * Tutorial videos on how to use WRS and how to do common tasks for different project types * Occasional training classes targeted toward faculty (could be advertised through the Office of Faculty Development)

Make it so that we can see our most common projects in the pull down.

1) When using the same report for several projects one after the other, typing in a new project number could be more user friendly. That is a hard one to explain here - sorry. 2) As above, when looking a several different projects one after the other, and different periods, sometimes the back arrow button takes you back to a different project, instead of a different period. Again, hard to express that here.

No

It might be nice to have a year-to-year comparison option.

Provide more imaging to backup documentation for things like deposits (pink deposit slip sufficient), JV's, IDT's, SUBS, etc.

No
The whole system is really terrible. It is not intuitive. It is hard to find specific info. When reports are required to funding agencies that include project finances, I am always late getting those turned in because WRS is so brutal to use. You can spend hours in this system and still not find what you needed. There has to be a better solution commercially available than trying to fix this mess up.
to have the enter button work to run a new project in reports in firefox and chrome. Floating Main menu button to allow for easy return to home page when needed in large accounts.
No - works great for me thanks!
None other than trying to figure out a way to make it so that no one can apply charges to projects taht are past the budget period. For example: a project that has a prime and each year there is a new project number given, but the prime is always active even though there are not to be any charges applied to the prime, as they should be applied to the new project ID, but they are not. Therefore, there is a lot of cleanup and JV's that are being done that should not. We need a way to make the prime projects that the budget period has ended on to not accept new expenditures.
Purchase orders (< $5000) to non-marketplace vendors are not encumbered. Instead, we must wait for the order to be completed and invoiced. This is way too late in many cases. Please consider immediately changing how POs/vouchers are encumbered so that they appear immediately upon placing the order. Thanks
When clicking to see the image of a P-Card charge posted on WRS, it would help to see the image to that specific charge and not the entire P-Card statement.
A longer run time for Report 14. As the year progresses and more data is pulled, Report 14 tends to time out for me before it pulls the information I need. With three functions in CALS - 16030, 16031 & 16032 - I need to be able to run these especially in May and June without them timing out.
No
No. I just learned how to use these reports and my only problem was slow performance made me think I didn't have access to the reports.
It is essential that training be provided in a formalized way on how to use WRS and what everything means. This was one of my biggest stumbling blocks as I tried to get a hold of my department's finances when I began my job as Director. I found myself going from person to person to try to patch together all the information that I needed.
Speed seems to be the issue with me. Other than that, the WRS systems meets my needs.
Is there an effective way to search the WRS for specific amounts without drilling down? If not, there should be an advanced find function of some sort that allows users to choose the type of transaction (IDT, Voucher, etc), the amount, date, vendor, etc. Also, I would like to take a training course for WRS, but there never seems to be any available. I was told this is because of the upcoming improvements, but I think training is crucial, especially for new employees whose jobs require every day use of WRS.
After drilling down, when you select a p-card image to view, the image is of the entire pcard statement. It would be great if we could isolate that specific transaction. Can deposits from the Cashiers Office include images? That would be very helpful, if it's feasible.
It would be helpful for Report #5 to show detail of personnel budget and expenses on the main screen without having to drill down in the budget column and the expenditure column.
Having an option to select a month to month ie (jan-feb) instead of cumulative "month ending feb 2014 snapshot of wrs 4,5,9 and 11
just the download to excel report not having the headers and footers
slow speed is the main issue
i generally like WRS and capacity to use with excel speed is the main thing. for improvements, see previous note on report 18
The reports are often so inaccurate to be useless or worse, misleading. WRS often does not reflect actions taken as much as 6 months earlier (salary redistributions, grad student graduating and coming off, JVs, etc.). The initial data entered also is sometimes wrong (grad student only proposed for 6 month period, encumberance shows full year, etc.)
As someone who uses WRS for occasionally monitoring accounts for our lab, I think improving the legibility of the reports would be very useful. Some of the features of the reports, such as what red vs. black means on certain accounts (5 accounts vs. 6 accounts, for example), are not intuitive to someone who doesn't know how they already work, and can cause confusion. I think improvements to consistency between account types would help with this. Additionally, it would be helpful to have a reference tool or document that would explain how to read the reports, as well as something that explains the different aspects of a line, for situations where the line description is not sufficient in explaining what purchase a particular line is referring to.
I have noticed in google chrome, it takes it a minute or two to pull up the journal report. Besides that, I do not have any issues.

Statistic	Value
Total Responses	95