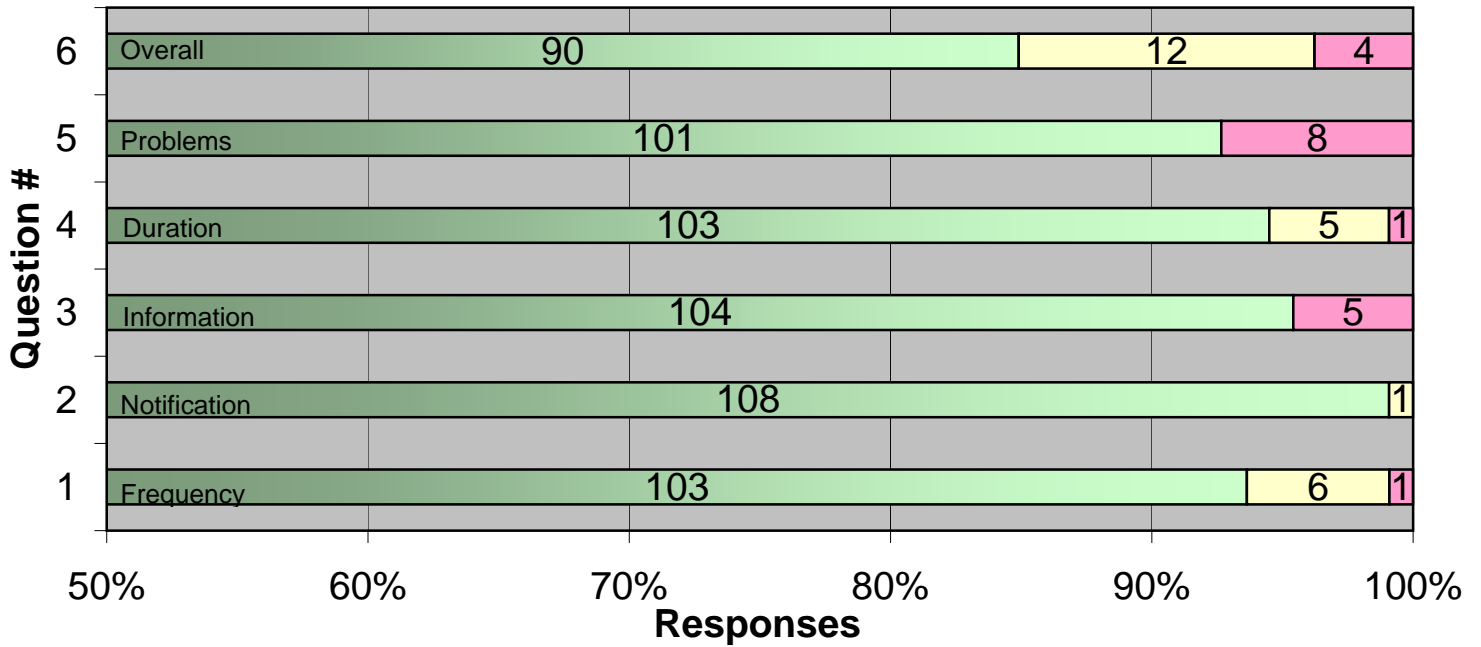


Financial 8.9 Upgrade Survey



1 How frequently do you use the Financial System?

Frequently = 103 (94%), Sometimes = 6 (5%), Never = 1 (1%)

2 Did you have prior notification of the Financial Upgrade that was completed on January 22nd?

Yes = 108 (98%), No = 1 (1%), Blank = 1 (1%)

3 Was the information you received regarding the upgrade sufficient?

Yes = 104 (94%), No = 5 (5%), Blank = 1 (1%)

4 How do you rate the amount of time that the Financial System was unavailable due to the upgrade?

Acceptable = 103 (94%), Inconvenient = 5 (4%), Excessive = 1 (1%), Blank = 1 (1%)

5 Have you encountered any major problems with the Financial System since the upgrade?

No = 101 (92%), Yes = 8 (7%), Blank = 1 (1%)

6 How well does the Financial System meet your needs

Overall = 87%

Response	Number	Percent
10	33	30%
9	32	29%
8	25	23%
7	12	11%
6	3	3%
5	1	1%
Blank	4	3%

How can we improve communication regarding future upgrades or changes?

- 1 A little 'training' on site might have been more supportive---even here on CC.
- 2 I had know idea what changes were going to be made. I think you had some training classes but my supervisor went.
- 3 Sending an email works better for me than posting on the portal.
- 4 There needs to be a consistent method of getting information. The messages do not always "trickle down" to people, especially in smaller departments. I was completely thrown off by the upgrades.
- 5 We need the how to books in the up grade class. They gave us papers that really did not tell us any thing and to take notes????
- 6 As long as the information is shared through news on the admin portal, and passed to the UBO's and mentioned maybe at personnel connections I think the information gets out fine. People on campus are more than willing to spread the word via word of mouth whenever there is a change, so it is hard not to know about changes that are going on.
- 7 At the moment , the email notifications are sufficient.
- 8 Communicating that the upgrade would happen was very good and the classes to help were very good but it seems that many on campus didn't go to the classes so maybe next time it should be mandatory that at least one person from each department goes to class so that they can take the info back to the dept.
- 9 Communication was excellent. I was aware of the process and updated regularly via emails.
- 10 Communication was good and the organization of the upgrade was excellent.
- 11 Continuing as you are via emails.
- 12 Email is fine.
- 13 Fine!
- 14 For Extension, we need to know about upgrades as far in advance as possible, so we can work with county employees.
- 15 I can't honestly think of anything short of somehow forcing/requiring people to pay attention!
- 16 I think the way it was this time was sufficient
- 17 I think you did an excellent job.
- 18 I was on the upgrade team from a functional perspective, so I was very aware of the upgrade. I tried to keep my department informed of how the upgrade was progressing and how it would impact them. There were emails sent out to campus in mass that I thought were sufficient in communicating the timeline, impact, etc.
- 19 It is adequate.
- 20 It might be nice to have a guide that lists all the changes to each financial transaction (vouchers, requisitions, etc.) and send the website to the departments so they can find the information pertaining to each particular transaction. This could be distributed to the bookkeepers through email or written notification.
- 21 It was well communicated.
- 22 Just keep up the communication through emails.
- 23 Meeting and emails
- 24 Not applicable. I received notices via the online notify system and saw the messages in the Portal, which I feel are adequate ways of announcing the changes.
- 25 OK
- 26 Send emails to the users directly instead of through main offices in the department. Info seldom gets passed effectively. List serves appear to be working well also.

How can we improve communication regarding future upgrades or changes? (continued)

- 27 The communication between EADS, Project Team and Users has been productive, beneficial and successful. Excellent teamwork, great project leaders and staff has made each upgrade better and better. Just like Virginia Slims - We've come along way Baby from the first 6.0 up to the 8.9 upgrades. With every change and upgrade you will have some problems. We did but each one was handled as quickly as possible with fast notifications and without much delay or interruption to the campus users. We truly appreciate everyones hard work and dedication to make NCSU a more efficient and pleasant workplace.
- 28 The information that was provide regarding the upgrade was well in informed in advance.
- 29 The listservs work well for us.
- 30 There was sufficient notification
- 31 Utilize other focus groups. Typically, UBO's are called upon to provide feedback and improvement areas.
- 32 You do a great job with upgrades and changes! Hard to imagine how you could improve.

Please describe any major problems encountered with the upgrade

- 1 We used to be able to see on a requisition where it is in the approval process. Once I approve a requisition, I am not able to see that info. We have had problems being able to print a requisition. There are fields that are not to be used but are available. If you use them, you have to re-enter the requisition. If we are not to use them, they shouldn't be available to us.
- 2 HI - please remember CALS has unique needs when it comes to security. The IDT system is an example. Having to enter every single OUC is a burden for us. ASAP should accept OUC ranges.

What improvements would you like to see in the Financial System

- 1 I think the system now is the best it has ever been. It is a vast improvement over the very beginning Peoplesoft application. I also think the Administrative Portal has made a big difference. Overall, any frustrations I have are usually with the HR portion not the Financial. Congratulations!
- 2 I like the improvements that were made.
- 3 Nothing comes to mind at this time.
- 4 I do not have any improvements that I can think of. I think the Financial System works well.
- 5 Non-Student Accounts Receivable Unit is limited in procedures and processing compared to campus. The only improvements suggested would be minor ones that would only effect our processing.
- 6 Would be nice if there was a way to link a PO to a requisition so that you could just click to get from the PO to the req that initiated it.
- 7 Date fields specific - not necessary to put / for dates.
- 8 Apparently, there are some items that are not making it to the worklist. I think this needs to be addressed.
- 9 System response is slower than I hoped - whether that is due to the Portal or application or something else.
- 10 An efficient customization page. Setting the tabs is an excellent idea, but rarely works consistently for me.
- 11 I would like for all the boxes to be on a page that I do not have to scroll to complete. The "Save" button is too far down and wastes time having to scroll to save and budget check.
- 12 It was nicer when all the info was on one screen and you did not have to use the mouse to scroll down to the save button and then use the mouse to scroll up to the approval tab. Ergonomically it did does not work as well.
- 13 I would like to be able to have the option to use keystrokes or the mouse for more functions. But in the scheme of things this is a small request.
- 14 less clicking and more tabbing, less wasted space

What improvements would you like to see in the Financial System (continued)

- 15 1) More user friendly for the non accountant and eliminate all acronyms and "tech talk." Make the system friendly enough that you don't have to be an accountant to use it. We could save a lot of money if we could just hire anyone off the street to utilize the system instead of having to pay for accounting technicians, accountants, etc.
2) To the extent possible, eliminate the use of numbers for references and use the english language. Some brainstorming to see how this could be done would be nice.
3) In tune with the above, we need to change the thinking of the people who design and implement systems. A system should not be considered a "good" system unless it can be used without any upfront training. Training costs are a significant expense, and lack of training also is a significant expense. Using the philosophy described could save hundreds of thousands and possibly millions of dollars per year, while at the same time making a more pleasant working environment. When a new system requires more technical skills on the part of the user or a higher grade of position, then we
- 16 A more comprehensive, more accessible help system available, similar to the "Help" tab in such programs as Excel, Word, and Quickbooks.
Extend weekday and Sunday hours of operation for Financial Production.
- 17 access to the system for more working hours, especially in evenings and on weekends
- 18 extend the availability hours bring back 24 hour access to WOLF reports
- 19 I'd like to see the preview option returned to queries like is available in HR.
- 20 I would like to be able to use the web browser Safari. Currently Wolf Reports does not support Safari. When using a Mac computer you must download FoxFire Web Browser to use the financials. Otherwise, the financial system is an outstanding tool! Congratulations on all your hard work!
- 21 During the Go-Live Validation, there was a three-hour block of time designated for central office data validation and central office data entry. It ended up taking about six hours. I suggest that more time is allowed for both of those activities in future upgrades. I also suggest that the time is designated in two blocks of time instead of one. That way, only those central offices that need to validate data can be here for that time (without having all of the central offices here waiting) so that the data can be validated thoroughly before data entry begins.
- 22 Less steps to processing a voucher
- 23 If you are approving certain documents from your work list, you must return to the list each time and click on view all to find transactions that are not listed in the first 25. Why not display all transactions?
Be able to budget check vouchers before you save. You must go to bottom to save and then back up and click to budget check. If you must save first, then have system return you to the exact place to budget check.
- 24 Search for vendors needs to be improved: Search by College would help narrow the search
- 25 Be nice if Voucher Number would appear at the bottom of the screen near the Budget Check button, as well as, at the top
- 26 Journal Voucher fitting to one page; Voucher Entry (Accounts payable) fitting to one page, remove save before budget check.
- 27 When you pull a vendor to see what invoices are paid, it would be nice to see all the information on one screen such as the paid date, check number it was paid with.
- 28 If we want to give Field Faculty a valid voucher number, that they can take to a vendor or use to place an order, it is very time consuming. We need the ability to assign vouchers numbers with as much ease as possible.
- 29 Reduce steps of unposting vouchers.
- 30 Requisitions require way to much navigation to complete the task
- 31 Easier way to enter Reqs

What improvements would you like to see in the Financial System (continued)

- 32 1.Easier access to Vendor info - also, phone/fax number display with vendor info.
2.When I change an amount on a line, and there's only one distribution line open, sometimes it pulls the new amount, and sometimes it doesn't. Must be something behind the scenes I can't see. It would be nice if it pulled the changed amount to the only open distribution line.
3.Speed - of course we want everything to occur instantaneously. Sometimes, there is a big wait for budget checks.
4.Speed - if cursors rested in most likely place - for instance, when we choose Update a PO, rest in the PO ID field. If we choose Add a PO, rest in Vendor ID field.
5.Don't show the Default Options section (Default and Override) on the defaults page if requestors are not supposed to change it - or make it more discreet, not at the top of the page. We get questions about that often.
- 33 The requisition form is pathetic. The previous format was better. There are screens missing from the requisition lookup and the way to search through them is extremely awkward. The description line for requisition should have remained accessible in the same manner as in the previous system.
- 34 Approval screen for Requisitions
- 35 I would like to see requisition entry made more user friendly.
- 36 On requisitions, it would be nice to see the account numbers being charged on the first tab. I approve them and always have a hard time remembering where the account number is.
- 37 Requisitions should be more user friendly
- 38 Quicker posting of University Cashier's deposits to accounting system.
- 39 I would like to see the dollar amounts go back to 2 decimals instead of three.
- 40 Faster printing process for JVs
- 41 On IDT's, I would like mine to come to just me and not the entire department. You can't tell who they belong to on the worklist page and have to open each one to find out if it's yours or not. At least put the person's name that it belongs to on the worklist page.
- 42 HI - please remember CALS has unique needs when it comes to security. The IDT system is an example. Having to enter every single OUC is a burden for us. ASAP should accept OUC ranges.
- 43 Ability to scan idt backup would be great
- 44 There should be a notification system attached with the IDT system. There are often items on the "worklist" that I miss because there is no official notification of them. I suggest a notification system similar to the direct deposit system that shows that money has been deposited into your account, the amount, and the date.
- 45 Further drill downs in WOLF. Such as when down to Journal #, being able to drill on the # and access the journal without having to leave WOLF and go to Journals to access it.
- 46 A better method to address change in account codes perhaps...The Financial system overall works well.

Do you have any other comments or suggestions that would help us provide better service?

- 1 Give Ron Reed, Yessy Mendoza and Tom Reynolds a huge raise. They are great to work with!!!
- 2 I am quite happy with the system. I do not use the system a tremendous amount but I am on it daily and find it very useful. Thanks!
- 3 Always appreciate your timely communications.
- 4 Keep up the good work!
- 5 Not at this time.
- 6 Keep users involved and continue the great communication. Thanks again for all the outstanding work you do ALL the time
- 7 Would like to see WOLF Reports available 24 hours per day.
- 8 Keep the system working past 7:00 in the evening.

Do you have any other commenets or suggestions that would help us provide better service?

- 9 As a new employee, this system was extremely complicated to learn. I have been in the job for over 6 months and still have a difficult time sometimes. I believe that the training should be transparent and that there should be follow up with new employees to make sure everything is clear. Furthermore, when there is a problem, it is very difficult to find any one within the Financial System to answer my questions. I have to be routed and rerouted to different people within the labrynth of people that work in the division. There should be a concise explanation of people to contact for certain instances, especially for new employees. That was information can be streamlined and time does not get wasted.
- 10 I'm still worried about rumours that Oracle is going to drop PeopleSoft and what they are going to substitute instead. Is this problem being researched?
- 11 It is not as convenient to use as it used to be. There are additional steps having to be made to check invoices paid. We don't know where to look to see if a receiving report is required. Although, it was stated there weren't many changes to the system, there were a lot of changes that affected the steps we take in our everyday duties. When we have requested help or explanations we are told either "that is the way the system is" or "we should be able to see that and they don't know why we can't".
- 12 I would have liked to see the booklets handed out before we go live on Payables. Not just pieces of paper to take notes on, when we could not see what was going on. Dorthoy Jacobs has been a great help with the Requistions. She is coming over tomorrow to set down with us on the Requistiions.
- 13 I would like to be able to put in a zip code or town name to sometimes look up a vendor(particularly if there are many of the same name in the database). I found that very useful on the older versions of Peoplesoft. PeopleSoft is very touchy about spaces, apostrophes, etc. I used to look up the zip code and be able to find the vendor when it wouldn't come up on the name.
- 14
1. The comments area on the Invoice Information Page could be exposed instead of hidden.
 2. After picking the vendor on the Voucher Entry Page you must choose a remit address for the check. On the Look Up Address Sequence Number Page, it would be great if the Vendor Name showed on this page. Currently the only vendor info that shows is the Vendor ID#.
 3. All pages would operate more efficiently if the entire page showed in one view without scrolling.
- 15 You are very responsive when we have problems/questions. You do an excellent job. The change in the Requisition Entry process, where "ADD" takes requestors directly to the Defaults page, will probably help us a lot. I'm really glad to hear about it.
- 16 The system seems to be a bit slower since the upgrade, particularly printing things like Journals where Crystal Reports is used.
- 17 Replace reports in Citrix. Citrix is extremely cumbersome and takes too much time to run reports.