

**NC STATE UNIVERSITY**

# Office of Information Technology EXPO 2008

Charting New Directions in Information Technology

## WOLFPACK REPORTING SYSTEM



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# WOLFPACK REPORTING SYSTEM OVERVIEW

- Designed to create a “one-stop shop” for many reporting applications available for campus use as well as various application links on the same menu.
- Anyone with a Unity ID can access the Wolfpack Reporting System.
- Accessible via MyPack Portal (*Financial Systems, Monitoring Tools & Reports*).
- The reports provide summary and detail information for a specific Project ID or based on specific criteria such as Department, Funding Group, Program, and Class.



# OVERVIEW *con't*

- Drill down functionality is available which allows you to explore and analyze multiple levels of information (Summary, Period, Journal). Click on the amount to drill down to next level of detail.
- Student Financial detail is available for journals that have a source of 'SF'.
- Images of supporting documentation is available for some transactions.
- Special security is required to access Payroll detail (Reports 11 & 12).
- Exact Match vs. Rollup Range reports.




# MAIN MENU

North Carolina State University      Wolfpack Reporting System (WRS)      Main Menu

Step 1: Select Report / Link

|   |   |
|---|---|
| <p><u>Reports</u></p> <ul style="list-style-type: none"><li><input checked="" type="radio"/> 1 - Fiscal Year-to-Date Financial Status</li><li><input type="radio"/> 2 - Project-to-Date Financial Status</li><li><input type="radio"/> 3 - Cash Balance</li><li><input type="radio"/> 4 - Financial Status</li><li><input type="radio"/> 5 - Financial Summary Status</li><li><input type="radio"/> 6 - Summary by Project Phase</li><li><input type="radio"/> 7 - Summary by Project Segment</li><li><input type="radio"/> 8 - Project-to-Date Budget/Expense Summary</li><li><input type="radio"/> 9 - Detailed Project Expenditures</li><li><input type="radio"/> 10 - Detailed Project Encumbrances</li><li><input type="radio"/> 11 - Detailed Payroll Expenditures</li><li><input type="radio"/> 12 - Detailed Payroll Encumbrances</li><li><input type="radio"/> 13 - Three Month Comparison</li><li><input type="radio"/> 14 - Chartfield Specific Balance by Account</li></ul> | <p><u>Links</u></p> <ul style="list-style-type: none"><li><a href="#">Chartfield Inquiry</a></li><li><a href="#">Contracts and Grants Attribute Inquiry</a></li><li><a href="#">Foundations Reports - Campus</a></li><li><a href="#">Gas Cylinder Inventory Report</a></li><li><a href="#">Gas Cylinder Rental Invoice Report</a></li><li><a href="#">Position Control</a></li><li><a href="#">Report2Web</a></li></ul> |
|---|---|



Step 2: Select / Enter Criteria

-- Enter a Project ID --    Exact Match:

Step 3: Select Period      Step 4:

As of today      View Report

[My Preferences](#)    [Frequently Asked Questions](#)    [C&G Spending Categories](#)    [Financial Training](#)    [Research Administration](#)    [Budget Office](#)    [System Availability](#)  
[Message History](#)    [Payroll Encumbrance Information](#)    [Spending Guidelines](#)    [Controller's Office](#)    [Contracts and Grants](#)    [Foundations](#)    [Logout](#)  
[Click here to email your questions or suggestions regarding the Wolfpack Reporting System](#)



# MY PREFERENCES

|  |  |  |              |   |  |
|--|--|--|--------------|---|--|
| North Carolina State University  |  | Wolfpack Reporting System (WRS)  |              | My Preferences  |  |
| Check the reports and links you want to appear on your Main Menu                                 |  |  |              |   |  |
| <u>Reports</u>   |  |  | <u>Links</u> |   |  |
| <input checked="" type="checkbox"/> 1 - Fiscal Year-to-Date Financial Status                     |  | <input checked="" type="checkbox"/> Chartfield Inquiry                               |              |          |  |
| <input checked="" type="checkbox"/> 2 - Project-to-Date Financial Status                         |  | <input checked="" type="checkbox"/> Contracts and Grants Attribute Inquiry           |              |   |  |
| <input checked="" type="checkbox"/> 3 - Cash Balance   |  | <input checked="" type="checkbox"/> Foundations Reports - Campus                     |              |   |  |
| <input checked="" type="checkbox"/> 4 - Financial Status   |  | <input checked="" type="checkbox"/> Gas Cylinder Inventory Report                    |              |   |  |
| <input checked="" type="checkbox"/> 5 - Financial Summary Status                                 |  | <input checked="" type="checkbox"/> Gas Cylinder Rental Invoice Report               |              |   |  |
| <input checked="" type="checkbox"/> 6 - Summary by Project Phase                                 |  | <input checked="" type="checkbox"/> Position Control                                 |              |   |  |
| <input checked="" type="checkbox"/> 7 - Summary by Project Segment                               |  | <input checked="" type="checkbox"/> Report2Web                                       |              |   |  |
| <input checked="" type="checkbox"/> 8 - Project-to-Date Budget/Expense Summary                   |  |  |              |   |  |
| <input checked="" type="checkbox"/> 9 - Detailed Project Expenditures                            |  |  |              |   |  |
| <input checked="" type="checkbox"/> 10 - Detailed Project Encumbrances                           |  |  |              |   |  |
| <input checked="" type="checkbox"/> 11 - Detailed Payroll Expenditures                           |  |  |              |   |  |
| <input checked="" type="checkbox"/> 12 - Detailed Payroll Encumbrances                           |  |  |              |   |  |
| <input checked="" type="checkbox"/> 13 - Three Month Comparison                                  |  |  |              |   |  |
| <input checked="" type="checkbox"/> 14 - Chartfield Specific Balance by Account                  |  |  |              |   |  |
| Enter Default Report Number (1-14 from above) <input type="text" value="1"/>                     |  |  |              |   |  |
| <b>Choose Display Defaults - These defaults only apply to Reports 1 through 7 and 14.</b>        |  |  |              |   |  |
| Balance Sheet Data: Hide <input checked="" type="radio"/> Show <input type="radio"/>             |  | Account Range Data: Hide <input type="radio"/> Show <input checked="" type="radio"/> |              | Journal Drilldown: Hide <input checked="" type="radio"/> Show <input type="radio"/>         |  |
| <b>Choose Excel Download Defaults - These defaults only apply to Reports 1 through 7 and 14.</b> |  |  |              |   |  |
| Balance Sheet and FTE Data: Basic <input checked="" type="radio"/> Full <input type="radio"/>    |  | Journal Drilldown: Basic <input checked="" type="radio"/> Full <input type="radio"/> |              |   |  |
| <input type="button" value="Save Preferences"/>  |  | <input type="button" value="Main Menu"/>   |              | <a href="#">View the Frequently Asked Questions regarding the Wolfpack Reporting System</a> |  |

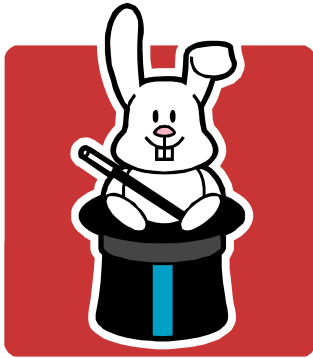




# Link Information

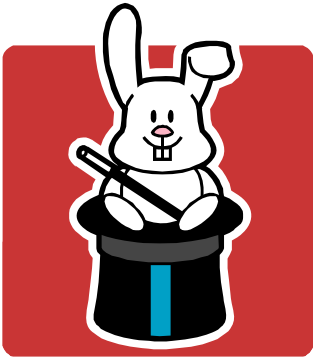
- My Preferences - Allows the customer to set preferences that control what reports/links appear on their Main Menu and to choose the Display and Excel Download Defaults for the reports.
- Message History - Includes all messages that have been created and displayed that relate to the Financial System and/or the Wolfpack Reporting System.
- Frequently Asked Questions - Provides answers to questions, instructions for using common features, and information that will help you become familiar with the Wolfpack Reporting System. Descriptions are also available for all reports.

# TIPS & TRICKS



- Wolfpack Reporting System often referred to as 'WRS'.
- All reports can be downloaded to Excel.
- Drill down is available on most columns and rows.
- Re-run feature by Project ID and/or As of Period is available on most reports.
- It is recommended that you click on the Main Menu button on the Summary, Period, and/or Journal pages to return to the Main Menu rather than use the Browser Back button. If you are on the Period or Journal page and need to move back one page, you should be able to click on the Back button.

# MORE TIPS & TRICKS



- Each column on the journal report can be sorted by clicking on the column header.
- Internet Explorer is the preferred browser, as some of the user-friendly functionality may not work for Netscape or Mozilla browsers.
- Personnel Encumbrances can be removed and the Budget Balance Available recalculated by clicking on the “Add/Remove Personnel Encumbrances” button on Reports 5 & 8.

# NEWEST REPORT

- **Report 14 – Chartfield Specific Balance by Account.** This new report replaces the Budget Management System (BMS). The report allows you to generate financial reports based on several criteria, such as Department, Funding Group, Program, and Class. The new report has more functionality than BMS, including drill down capability, FTE information, selecting and displaying 6-digit department information, and ability to run the report for any month.



# FUTURE ENHANCEMENTS

- Allow drill down capability for Purchase Order (Pcard) transactions.
- Add a Project ID dropdown box in Step 2 for all customers. *Principal Investigators currently have a Project ID dropdown box.*
- Add a preference item to control the display of Project IDs in the dropdown box based on Project Status (Active, Pending, Inactive).
- New Federal Fiscal Year-to-Date Report will replace existing Report 2 (Project-to-Date Financial Status).
- Allow customers to drill into HR data from Journal page for Payroll accounts (special security will apply).
- Allow customers to click on Journal ID or Journal Line Ref and provide a new page with details about the document ID.
- New Report 15 – Chartfield Specific Balance by Project



# QUESTIONS



- Review the Frequently Asked Questions using the link at the bottom of the Main Menu.
- Contact the NC State Help Desk at (919) 515-4357.
- Email questions or suggestions regarding the Wolfpack Reporting System using the link at the bottom of the Main Menu.

# THANK YOU

Thank you for coming to the 2008 OIT Expo and for attending the Wolfpack Reporting System breakout session this morning. We hope that the system and the many available features will make your Financial Reporting tasks easier and more efficient.

Enjoy the rest of the Expo!

