| Process: | WolfPack Reporting System and Queries | | |
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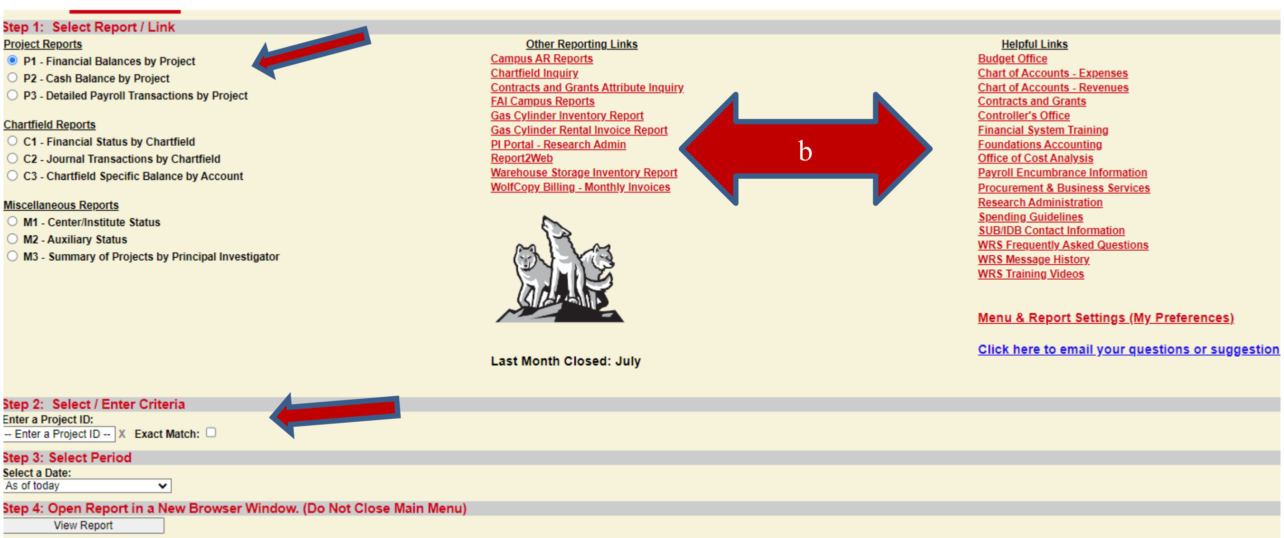
| Contact: | Humanities and Social Sciences Financial Services | Last Revision Date: | 08/14/2023 |

## WolfPack Reporting System (WRS):

This system includes a variety of "customer-friendly" financial reports, generated from queries, which provide information about projects and transactions. WRS can be searched by current date and prior month-end periods for projects and units, and can be downloaded into *Excel*. WRS reports may include personnel expenses, and some reflect only payroll transactions. The Main Menu page provides links to other reporting applications, such as Chartfield Inquiry, Position Control and Report2Web.

WRS provides current, monthly, and Fiscal-Year-To-Date (FYTD) information. A typical report header includes a brief description of the purpose of the project, and food and entertainment exemption status. Report information is dependent on whichreport is selected, but totals fields are often links to the supporting details; and detail lines often have links to supporting documentation, including images of scanned documents.

1. Accessing and customizing WRS:
   The path from MyPack Portal to WRS is Financial Systems >Financials Quick Nav> Monitoring Tools and Reports > WolfPack Reporting System (WRS).




   The WRS Main Menu page includes:
   a) Three sections that guide you to select a report;
   b) Two sections that provide links to other, related information; and
   c) Report settings to select display options

2. Selecting or creating the "right" report:
   - Review the online training videos linked on the Main Menu page.
   - Click on the WRS Main Menu's "Frequently Asked Questions" for complete report descriptions.

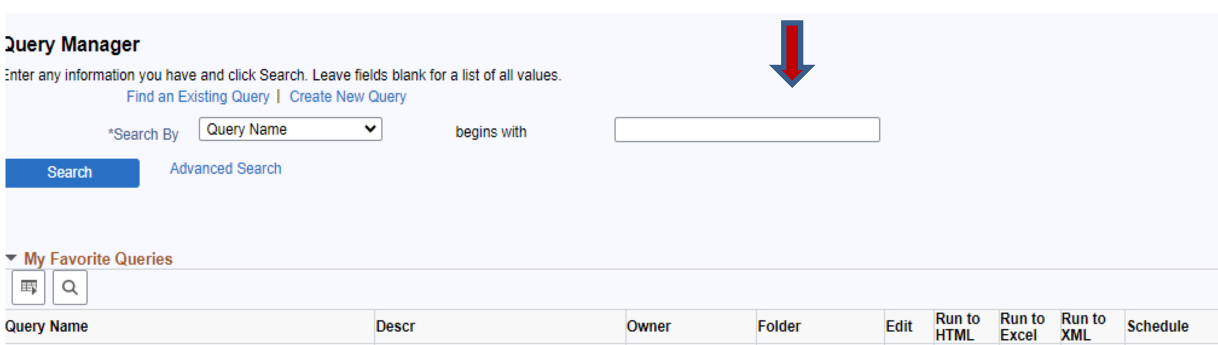
- Use the Show/Hide boxes at the top of the report to modify the data columns that are visible on a report display.
- Create reports you can individualize by downloading WRS reports as *Excel* files.

3. Tips for finding what you need:
   - Look at zeros – just because the current total is zero does not mean that there was not activity – ALWAYS click on a zero total field to see what it includes. For example, a JV or IDT may have "canceled" an expense, leaving a zero balance.
   - You cannot modify a project number in the search field; enter the whole new project number.
   - Check "Exact Match" on the main menu, or "Exact?" on the reports, to get only the project or phase activity, or leave unchecked to get the project and phase(s) activity combined.
   - You will need to select another reporting period – the June report lists all transactions in a FY – if the activity you are researching occurred in another FY.
   - Transaction detail pages can be sorted in ascending or descending order by clicking on the column headings.
   - You may find it easier to work with the information a report provides, if you download the report into a spreadsheet; the first menu box above the report heading is "Download to Excel."
   - Transactions appear on WRS before they are paid, and, in some instances, before they receive final approval.
   - Orders placed through MarketPlace or with a requisition will appear on WRS as encumbrances until they have been paid

## Queries:

Queries extract financial data from stored data tables and allow the user to design the presentation of the data.  Some queries have been developed and are available, and new ones can be created, to provide desired transactional data, especially to support repetitive inquiries, such as checking for paid vouchers each month.

1. Accessing and customizing Queries
   - The path from MyPack Portal to Queries is Financial Systems >Financials Quick Nav> Monitoring Tools and Reports > Query Viewer (Rpt).




   - If you have not selected"favorite" reports, leaving the "begins with" box empty, and clicking the Search box will list 300 reports, so it is helpful to have some information about what queries are available and how the names are structured.

- A query is saved in "My Favorite Queries" by clicking the small box beside the desired query in the listed queries, and choosing "Add to Favorites" from the "Action" drop-down options.
- Queries are designated as Private or Public. Public Queries are created and stored to allow all Financial System users access; only a few users can save queries as Public. A Private Query is created and saved so that only the user saving it can access it and run it; anyone with query access can save private queries.

2. Choosing a Query:
   There are listings of useful queries available from such places as other departments and Colleges, as well as from the Controller's Office. Groups of queries can be listed by searching for a Query Name that "begins with"; for example, begins with "Q" for vouchers, or begins with "NC_TRAV" for travel processing status.

   Some useful voucher queries are:
   - **Q_Vchr_List_Not_PD_2DIGIT_OUC**
     Listing of unpaid vouchers by 2 digit department ID
   - **Q_Voucher_List_Not_Paid_BY_OUC**
     Listing of unpaid vouchers by OUC
   - **Q_Vchr_PendingCollege_by_OUC**
     Listing of vouchers needing college/campus approval
   - **Q_VCHR_INCOMPLETE_BY_OUC**
     Listing of unrouted vouchers by OUC

   Some useful travel queries are:
   - **NC_TRAV_REIMBS_BY_OUC**
     Use this query to view pending and paid reimbursements; the query pulls information by a range of dates
   - **NC_TRAVEL_SEARCH**
     Use this query to view open travel authorizations; the query pulls information by authorizations for your OUC
   - **NC_TRAV_SUBMITTED_NOT_APPRV**
     Use this query to view all open travel documents and view what approval levels have occurred. This query pulls information by looking at the OUC of the person logged in to the portal.

3. Running a Query:
   Select the query by selecting "Run to HTML" (there is an option to download to an Excel spreadsheet from the HTML report) or "Run to Excel" on the row of your desired query. Most queries require additional selection criteria such as FY or OUC – enter the required information and click "View Results".

**Additional References:**

WRS Training Videos:
https://oit.ncsu.edu/about/units/eas/financial-systems/training/

Wolfpack Reporting System FAQ's
https://webappprd.acs.ncsu.edu/scripts/wrs/ncw_faq_main.pl