Task Force on Reporting Strategies – 01/09/03
Functional Group Questions – Team Comments

Team	What is working well?	What is not working well?	What data or information barriers are there that hinder or prevent you from getting your job done?	What data/information are you currently getting?	What data/information are you not currently getting?	What suggestions do you have for improvement?

Accounting	• Web reports – they are out there, but may not be working well for everyone
	• Queries in Finance – not widely used/users aren't trained
	• Feeders
	• Daily and monthly processing
		• System/Functional problems –
		  ✓ Encumbrances
		  ✓ Grant/Project reporting – does not provide what those users need
		• Revenues – shows billed but not collected
		• System performance is an issue – down time
		• Consistency and data integrity
		• No high-level campus reporting
		• MOBIUS
		  ✓ Not user friendly
		  ✓ Hard to use
		  ✓ Users unaware of availability
			• Knowledgeable users
			• Timing/accuracy of feeders
			• Format/presentation of reports are poor
			  ✓ Creates rework or dual data entry
			• No effective repository for reports are created centrally
				• Web reports
				• Queries
					• Performance measures/ratios
					• Position management
					• Fee data by college/school
						• Education/Training – on reports we already have
						• Common repository for reports
						• Testing reports/changes – make sure users' needs are met

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HR	• Employees getting paid • Single instance ad hoc reporting by technical staff • Some reports and queries (developed by technical staff) are being provided	• Cross instance reporting • Delivered reports are not adequate • Effective dated tables are not good for reporting • Due to complexity of data structure, the average user cannot produce a report, i.e. labels	• No data dictionary and standards • Joining tables (PS Query limitations) • Effective dating is complex • Limited reporting tools available to average user	• Reporting instance access • Various reports	• Data dictionary • Ad hoc reporting by end users • Management reports	• Cross instance access easier • Improve tools and train users on data access • Design and implement data warehouse/data mart structures • Create/cultivate technical positions to work with functional

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Student	• Downloaded data easily accessed by non-technical functional staff • Four-campus, mandated reports, written by UM/MIS office (so they are all the same) • Functional users knowledgeable of data structure and can provide information as needed to technical staff • Campuses have the tools for production and ad hoc reporting • Web applications • Highly technical staff working with users	• Improvements are not being made in legacy because focus is on PS implementation – changes on hold • Difficult to hire staff with experience in legacy tools	• When downloads don't work, refreshed data is not available • No UMDW refresh on all SIS tables at MU • Need to closely define selection criteria • Time, due to volume of requests	• Everything related to student records • Some HR data	• UMDW HR crosswalk table (SSN, EmplID) • HR address data	• Systems need to be continuously improved and at the time, understandably, legacy is not • With institutional need-to-know, data should be accessible (HR)

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Academic Affairs	• Finance/Accounting system • Responsiveness of person asked for information	• Grants • Payroll • Added burden we put on HR staff • HAMP reports	• Do not know what is available • Time required for IR to respond to complex ad hoc reports	• Almost nothing, other than pulling FBMO information off web • Admissions/exceptions/session • Enrollment • Faculty work loads	• End of date on grants • Weekly report on account deficits • Vacation/sick leave balances	• Increase documentation requirement on Procard

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IR	• General access to data (IPEDS, etc.) • SQR's	• Security (complicated) • Integrated reporting capablility • Full understanding of table and data structure in PeopleSoft • Disseminating of reports • Inadequate central response (except for Ben) • MOBIUS "POC"	• Documentation (absence of – what's there and how to use) • Security • Retaining and integrating data from a variety of sources	• PeopleSoft: GL, Student, Grant • Non-PeopleSoft UIDS, UMDW, MOBIUS	• Gift information • Documentation • Trend	• Make security less ponderous • Searchable, quality documentation • Exchange of information between users • Make sure reports tie • Document business processes of users • Platform that allows different levels of access to data, use of various tools • "Drill-down" capabilities

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End/Fiscal Users	• HR query (UMR)
	• Processing electronic JE's
	• Use of classes to certain degree
		• Financial reports
		  ✓ No encumbrance on IS
		  ✓ IS & BU don't balance
		  ✓ Can't get encumbrance by class
		  ✓ IS "Checklist" often missing transactions
		  ✓ Incorrect encumbrance
		  ✓ Encumbrance drill-down YTD
		  ✓ Actual drill-down on IS – include more than they should
		• Can't print PeopleSoft screens
		• FY02 year-end close!!!!
			• Encumbrances not in format needed	• Shadow (i.e. electronic 60s) "programs"	• DeptID reports not in format needed
					• Leave accrual reports do not show current hours processed (just balances and YTD taken) (call Linda for solution)
					• Report of JEs processed
						• Training – what's out there for us to utilize
						• Look at what will truly eliminate "shadow systems," i.e. allow for adjusting encumbrances
						• Involve more true end users
						• Fiscal officers communication (campus and system-wide)