

Accounting Reports Survey

The *Reporting Tools Advisory Committee* is a group consisting of Controller's office staff, IMFO (Information Management Finance & Operations) and various Budget Officers across campus. The committee's goal is to determine the best manner in which to transition to electronic/web accounting reports. As a part of this review, we sought feedback via a survey sent to over 3,000 recipients of printed transaction detail reports (SA3-Statement of Accounts, TDS-Transaction Detail Statement and FMS-Financial Management Summary). Approximately 22% responded to the survey and below is a summary of the results. In addition to this information, we continue to review your comments/suggestions for improvement to existing standard reports. The survey results have been helpful in understanding utilization of printed & web detail reports and user needs for drill-down, annotation, etc. Thanks to those of you who took the time to participate in this survey.

Number of people in survey population: 3,136

Number of people who completed the survey: 704

Response Rate: 22%

Respondent Demographics:

(1) Org Units		
Central Administration (ORGs 1 - 9)	112	16%
College Lib Arts and Sciences (ORG 11)	103	15%
College of Business Admin (ORG 12)	14	2%
College of Dentistry (ORG 13)	23	3%
College of Education (ORG 14)	24	3%
College of Engineering (ORG 15)	35	5%
College of Law (ORG 16)	7	1%
College of Medicine (ORG 17)	166	24%
College of Nursing (ORG 18)	19	3%
College of Pharmacy (ORG 19)	16	2%
College of Public Health (ORG 20)	26	4%
Graduate College (ORG 29)	7	1%
Other Academic Units (ORGs 30-39)	10	1%
Auxiliary Units (ORGs 40-49)	28	4%
Health Care Units (ORGs 70-94)	83	12%
Other/Org not listed	31	4%
	704	100%

(1) Function/Role		
Admin/support staff	288	41%
Dept administrator	95	13%
Budget officer	49	7%
Principal investigator	94	13%
Researcher / faculty	93	13%
Research administrator	15	2%
DEO	7	1%
Other function	63	9%
	704	100%

Summary of Results (Non-Grant Reports)

- ◆ Of those who responded to the survey, most recipients of printed detail reports are using the reports - 92% of those who know they receive reports state that they are using them.
- ◆ Approximately 57% of survey respondents use the web version of the report. This is a higher number than we expected.
- ◆ There are no surprises in the purpose for report review (verify transactions, view balances, use for future projections).
- ◆ Approximately 40% of recipients *manually input* report data into another system/application. This is higher than we expected.
- ◆ Approximately 57% percent of survey respondents annotate on the printed reports.
- ◆ Approximately 40% of respondents go to another subsystem for information (most common are Cump Comp, A/P & MARS)
- ◆ Approximately 70% of respondents retain hardcopies of reports (primarily for documentation and easy access).
- ◆ Approximately 52% of respondents find a fiscal YTD format to be useful but 38% of respondents answered "I don't know."

Summary of Results (Grant Reports)

- ◆ Of those who responded to the survey, most recipients of printed detail reports are using the reports - 92% of those who know they receive reports state that they are using them.
- ◆ Approximately 30% to 40% of survey respondents use the web version of the report.
- ◆ There are no surprises in the purpose for report review (verify transactions, view balances, use for future projections).
- ◆ Approximately 25% to 30% of recipients *manually input* report data into another system/application.
- ◆ Approximately 40% to 50% percent of recipients annotate on the printed reports.
- ◆ Approximately 20% to 30% of respondents go to another subsystem for information (most common are Cump Comp, A/P & MARS)
- ◆ Approximately 50% to 60% of respondents retain hardcopies of reports (primarily for documentation and easy access).
- ◆ Approximately 35% to 45% of respondents find a fiscal YTD format to be useful but 45% to 50% of respondents answered "I don't know."