



Advancement Decision Center
Release 4

Product Vision

- For:* GW Development and Alumni Relations Decision Makers
Who: Desire a simple way to access, use, and understand Advancement Information
The: Advancement Decision Center
Is an: Integrated source of Advancement data
That: Provides easy to use information that spans multiple years and can be consumed in multiple ways (Reports, Cubes, Dashboards, etc...)
Unlike: Cognos reporting from Ellucian Advance
This Product: Will be integrated with other GW ERP data, easy to use, visual, automatically updated, secured, and certified

New Features:

The Advancement Decision Center provides fund raising activity data extracted from the Advancement system at the close of every business day. The Development and Alumni Relations (DAR) Office are the primary users of the Decision Center. The DAR Technical Services group has developed several dashboards, collectively called the **GWU Campaign Dashboard**, that shows:

- o Total Campaign Donations
- o Donations by Monetary Level
- o Donations by School/Unit
- o Donations by Entity Type
- o Donations by Campaign Use
- o Donations by Campaign Pillar
- o Donations by Transaction Type
- o Donations by Geographic Location

Over 300+ target users for these dashboards include Development Officers, Alumni Relations, Advancement Services and the DAR Executive Team.

Availability:

- Available through Ellucian Advance (requires authentication): <https://gwu-prod.elluciancloud.com/default.aspx>



Financial Directors (FD) Dashboard

Release 4

Product Vision

- For: Finance Directors*
Who: Would like to manage their budgets effectively
The: Financial Director's Dashboard
Is an: Interactive and visualization tool
That: Provides key information and metrics
Unlike: Compiling data from different sources and merging them together in spreadsheets
This Product: Can be accessed online or on mobile devices, is secure, and pulls data from the data warehouse

New Reports:

- Expect reports to run in a minute or less
- Can be found under Analysis & Reporting > General Ledger Reports

1. GL Income Statement by Org

- o Shows GL activity by Org, aggregated depending on where the selected Org sits in the Org hierarchy
- o Breaks down GL activity by Account Reporting Attributes (eg. Revenues, Expenses, etc.)
- o Shows YTD Actual, YTD Budget, Approved Annual Budget, Prior YTD Actual, Period to Date Actual and variances
- o Allows the user to drill-down to any Account Reporting Attribute to see more detail. Users can drill-down to the GL Line, the GL SLA and A/P Invoices.
- o Prompts allow the user to pick an Entity, Fund/s and/or Net Asset Class/es
- o Should be used only for pulling historical data. For current Fiscal Year activity, use #2 – GL Income Statement by Org (Current FY).

2. GL Income Statement by Org (Current FY)

- o Same as #1 but the prompt for Accounting Period is limited only to the periods in the current Fiscal Year

3. GL Income Statement by Org and Account (Current FY)

- o Same as #1 but the prompt for Accounting Period is limited only to the periods in the current Fiscal Year and the report breaks down GL activity by the Org and Account

4. GL Summary by Org

- o A high-level summary of GL activity that allows users to drill up and down the Org hierarchy
- o Shows Total Revenue, Salaries and Wages, Fringe Benefits, Total Compensation, Total Expenses, Net Income, Budgets and variances by Org
- o Allows the user to drill-through to the GL Income Statement by Org (report #1) for any given Org shown in the report

5. GL Summary by Org (Current FY)

- o Same as #4 but the prompt for Accounting Period is limited only to the periods in the current Fiscal Year

6. GL Variance Exception Report (Current FY)

- o Same as #2 but allows the user to filter the data based on variances
- o Users can compare YTD Actuals to a) YTD Budget, b) Annual Budget, or c) Prior YTD
- o Users can compare using a) Dollar and Percent variance, b) Dollar variance only, or c) Percent Variance only

Availability:

- GL data is secured using EAS security rules. All accounting strings that a user has access to in EAS will be available for reporting in the Data Warehouse.
- Reports are accessible through the Data Warehouse: <https://qsource.gwu.edu/>.
- To request access to General Ledger reports –
 - o For existing data warehouse (data marts) users, send a [Helpdesk ticket](#).
 - o For new users, sign up for [training](#).
- In the future, a page will be created for Financial Directors to navigate to and access the different dashboards and reports.



General Ledger (GL) Decision Center **Release 4**

Product Vision

- For:* GW Financial Decision Makers
Who: Desire a simple way to access, use, and understand General Ledger Information
The: General Ledger Decision Center
Is an: Integrated source of General Ledger data
That: Provides easy to use information that spans multiple years and can be consumed in multiple ways (Reports, Cubes, Dashboards, etc...)
Unlike: The GL-329 Cube
This Product: Will be dimensional at the detail level, automatically updated, secured, and certified

Features:

- GL data from the last 5 fiscal years has been brought into the data warehouse to provide users with the capability to drill down from high-level summary data down to transaction-level data. Data in the warehouse includes:
 - Actuals and Approved Budget from GL Balances
 - Actuals and Approved Budget from GL Headers and Lines
 - Actuals from GL SLA (Sub-ledger Accounting)
 - A/P Invoices

Performance Improvements:

Since the previous release, BIS has been working on improving the performance of the GL Decision Center to speed up queries against more than 30 million rows of GL data.

- Excluded accounts from the General Ledger that have had no activity for the last 5 years
- Created a record set with only the current Fiscal Year's activity for reports that are only concerned with Year-to-Date activity

New Reports:

-Expect reports to run in a minute or less-

-Can be found under Analysis & Reporting > General Ledger Reports

1. GL Income Statement by Org

- Shows GL activity by Org, aggregated depending on where the selected Org sits in the Org hierarchy
- Breaks down GL activity by Account Reporting Attributes (eg. Revenues, Expenses, etc.)
- Shows YTD Actual, YTD Budget, Approved Annual Budget, Prior YTD Actual, Period to Date Actual and variances
- Allows the user to drill-down to any Account Reporting Attribute to see more detail. Users can drill-down to the GL Line, the GL SLA and A/P Invoices.
- Prompts allow the user to pick an Entity, Fund/s and/or Net Asset Class/es
- Should be used only for pulling historical data. For current Fiscal Year activity, use #2 – GL Income Statement by Org (Current FY).

2. GL Income Statement by Org (Current FY)

- Same as #1 but the prompt for Accounting Period is limited only to the periods in the current Fiscal Year

3. GL Income Statement by Org and Account (Current FY)

- Same as #1 but the prompt for Accounting Period is limited only to the periods in the current Fiscal Year and the report breaks down GL activity by the Org and Account

4. GL Summary by Org

- A high-level summary of GL activity that allows users to drill up and down the Org hierarchy
- Shows Total Revenue, Salaries and Wages, Fringe Benefits, Total Compensation, Total Expenses, Net Income, Budgets and variances by Org
- Allows the user to drill-through to the GL Income Statement by Org (report #1) for any given Org shown in the report

5. GL Summary by Org (Current FY)

- Same as #4 but the prompt for Accounting Period is limited only to the periods in the current Fiscal Year



General Ledger (GL) Decision Center
Release 4 (con't)

6. GL Variance Exception Report (Current FY)

- o Same as #2 but allows the user to filter the data based on variances
- o Users can compare YTD Actuals to a) YTD Budget, b) Annual Budget, or c) Prior YTD
- o Users can compare using a) Dollar and Percent variance, b) Dollar variance only, or c) Percent Variance only

Availability:

- GL data is secured using EAS security rules. All accounting strings that a user has access to in EAS will be available for reporting in the Data Warehouse.
- Reports are accessible through the Data Warehouse: <https://gsource.gwu.edu/>.
- To request access to General Ledger reports –
 - o For existing data warehouse (data marts) users, send a [Helpdesk ticket](#).
 - o For new users, sign up for [training](#).
- In the future, a page will be created for Financial Directors to navigate to and access the different dashboards and reports.

To be retired:

- The GL329 cube, which was an unsecured way to access GL data, will no longer be available through the Data Warehouse.



Principal Investigators (PI) Dashboard
Release 4

Product Vision

For: Principal Investigators
Who: Would like to manage their awards
The: PI Dashboard
Is an: Interactive visualization tool
That: Provides key information and metrics
Unlike: Compiling data from different sources and merging them together in spreadsheets
This Product: Can be accessed online or on mobile devices, is secure, and pulls data from the data warehouse

New Reports:

- **Monthly Run Rate**
 - Summarizes an award's total expenses by month and calculates the average monthly expenditure. The report then projects total expenditures to the end of the award and will predict if the award will go over or under Budget
 - Accessible through the PI Dashboard's More Tools tab: <http://research.gwu.edu/pi-dashboard-visualizations>
- **Labor Effort report**
 - Shows the percent of effort spent by an employee on a given award based on Banner HR Labor Distributions
 - Also includes the percent of effort spent on teaching and on other awards within the same pay period
 - Labor Distributions are broken down by PICT code, pay number, Banner Index and Position No
 - Accessible through the PI Dashboard's More Tools tab: <http://research.gwu.edu/pi-dashboard-visualizations>

Modified Features:

- **Interactive Visualizations**
 - Alerts are now incorporated in the Budget and Actuals visualization. The Alerts tab has been taken out. If an award has an alert, the user will see an exclamation mark "!". Clicking on the award then displays the award's alert/s.
 - An award filter has also been added to let users view only awards with alerts.
 - A new tab has been added called "More Tools". Users will be able to drill to other reports from this tab (see New Reports above).
- Reports include a "Data refreshed on:" date at the bottom right of the dashboard to inform users of when the data was loaded into the warehouse (Note: Barring any technical issues, data on the PI Dashboard is as of the close of the previous business day.)

Availability:

- Accessible through OVPR's website: <http://research.gwu.edu/pi-dashboard>



Human Resources (HR) Decision Center
Release 4

Product Vision

- For:* GW HR Decision Makers
Who: Desire a simple way to access, use, and understand Human Resources Information
The: HR Decision Center
Is an: Integrated source of Human Resources data
That: Provides easy to use information that spans multiple years and can be consumed in multiple ways (Reports, Cubes, Dashboards, etc...)
Unlike: SQL reports and manual spreadsheets
This Product: Will be easy to use, visual, automatically updated, secured, and certified

New Features:

- Added Position Location to the Position dimension.

Modified Features:

- The Business Day indicator is now being sourced from the PTREHOL table in Banner.

Additional Notes:

- A user's access is based on their Home Organization and Employee Class

Availability:

- Available by using Query Studio and Report Studio in the Data Warehouse: <https://gsource.gwu.edu/>.
- In future releases, the data will be made available using Tableau



BIS Strategic Initiatives

Cognos Sandbox:

- To further promote self-service BI across the University, a Cognos server is now available for report authors
- This environment, separate from Production, will allow power users to build and test their own Cognos reports using data from the Data Warehouse, as well as data from previous day copies of Banner and EAS
- Cognos training will be provided in the coming months for report authors

Availability:

- Access available through participation in training.