



**Executive Level Award Dashboard**  
**[BETA Release]**

**Product Vision**

- For:* School Decision Makers
- Who:* Would like to manage awards and PI activity for a school or department
- The:* Executive Awards Dashboard
- Is an:* Interactive and visualization tool
- That:* Provides key information and metrics
- Unlike:* Waiting on quarterly reports or periodic reviews from OVPR and GCAS
- This Product:* Can be accessed online or on mobile devices, is secure, and pulls data from the data warehouse (primarily PI Dashboard and General Ledger Decision Center data)

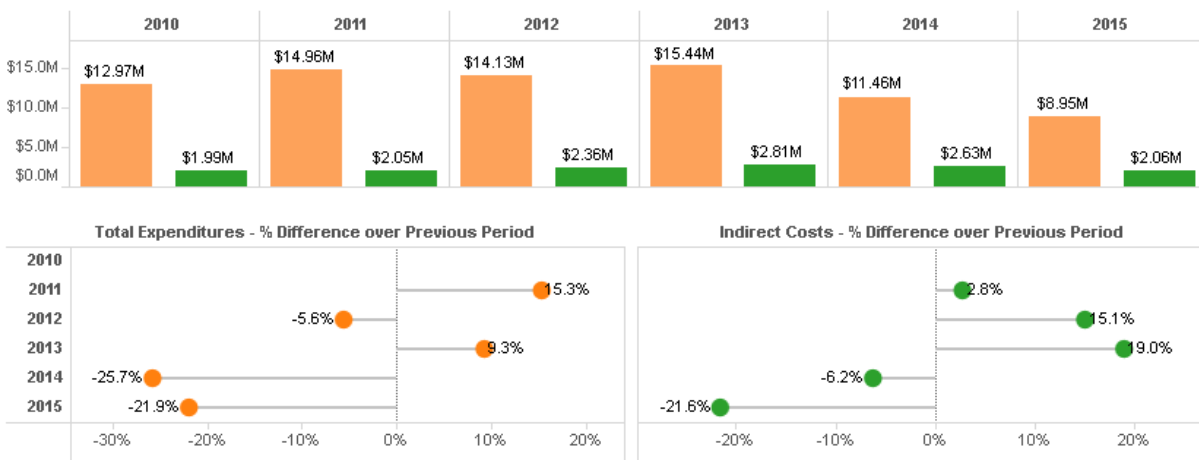
**New Features:**

The Executive Level Award Dashboard takes the data used in the PI Dashboard, aggregates it and reports on important metrics at the Department level. These include:

- Total Expenditures and Indirect Costs by :
  - o Fiscal Year
  - o Organization (College or Research Institute)
  - o Departments within the Organization
  - o Individual Principal Investigators
- Total number of Principal Investigators by Fiscal Year and Organization
- Total awards by Fiscal Year and Organization
- Total Budget and Expenditures by PI, by Award

**Availability:**

- This **BETA** release will be made available to OVPR and key Executive Level users using this link: [Executive Level Award Dashboard \[BETA\]](#).



(Sample screen shot of Direct and Indirect costs)



**Financial Directors (FD) Dashboard  
 Release 5**

**Product Vision**

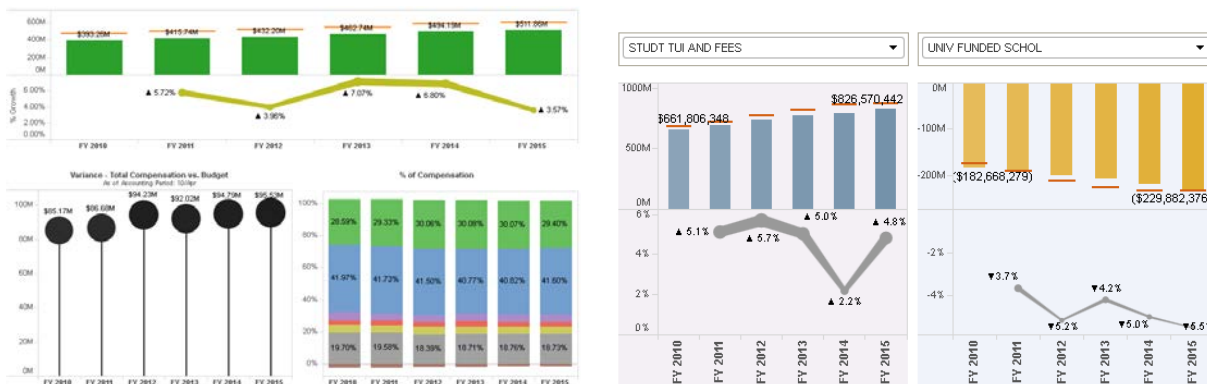
- For:* Finance Directors
- Who:* Would like to manage their budgets effectively
- The:* Financial Director's Dashboard
- Is an:* Interactive and visualization tool
- That:* Provides key information and metrics
- Unlike:* Compiling data from different sources and merging them together in spreadsheets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

**New Features:**

- **General Ledger Balance Trend Analysis [BETA Release]** – A series of visualizations that show GL activity over the past 5 fiscal years. Includes year-over-year percentage growth and variance. Users have the ability to select the Accounting Period for period comparisons, Entity, Fund, Net Asset Class, and navigate through 3 levels of the Organization hierarchy.
  - Net Revenues – totals of all accounts for an Org that roll-up to REVENUES
  - Compensation – totals of all accounts for an Org that roll-up to EXPENSES and fall under SALARIES AND WAGES or FRINGE BENEFITS
  - Other Expenditures – totals of all accounts for an Org that roll-up to EXPENSES and are not considered as Compensation
  - Other Changes in Net Assets – totals of all accounts for an Org that roll up to OTHER

**Availability:**

- GL data is secured using EAS security rules. All accounting strings that a user has access to in EAS will be available in the visualization.
- The **BETA** release is available using this link: [General Ledger Balance Trend Analysis \[BETA\]](#)
- In the future, a page will be created for Financial Directors to navigate to and access the different dashboards and reports.



(Sample screen shots)



## General Ledger (GL) Decision Center Release 5

### 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

### New Features:

- Tableau Data Sources have been made available for power users to connect to and create their own visualizations.
  - **General Ledger Balance – 2 Year Summary** - contains GL Balance activity for the current and previous fiscal years
  - **General Ledger Balance** - contains GL Balance activity for the last 5 fiscal years
  - **General Ledger Line** - contains GL Lines activity for the last 5 fiscal years

### Availability:

- These Tableau data sources are available for power users using Tableau Desktop 8.3. To request access, please send an IT [Helpdesk ticket](#).
- 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.



**Advancement Decision Center**  
**Release 5**

**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 **GWU Attainment Dashboard** provides a summary view of fundraising performance by fiscal year. The dashboard, developed by the DAR Technical Services group, allows members of Development and Alumni Relations (DAR) to quickly and easily view transactional data by a number of different metrics. Furthermore, the dashboard displays data either in context of Total Attainment or Cash Received by the university on an annual basis. By presenting historical data in a graphical format, department leadership can use previous strategies and events to make better-informed future business decisions.

Data from the Advancement Decision Center is used to visualize the following metrics:

- o Attainment Year-by-Year Comparison
- o Attainment by Geographical Location (uses maps)
- o Attainment by School/Unit
- o Attainment by Allocation Use
- o Attainment by Transaction Type
- o Attainment by Entity Type and Monetary Level

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>



## Enrollment Management Dashboard

### Product Vision

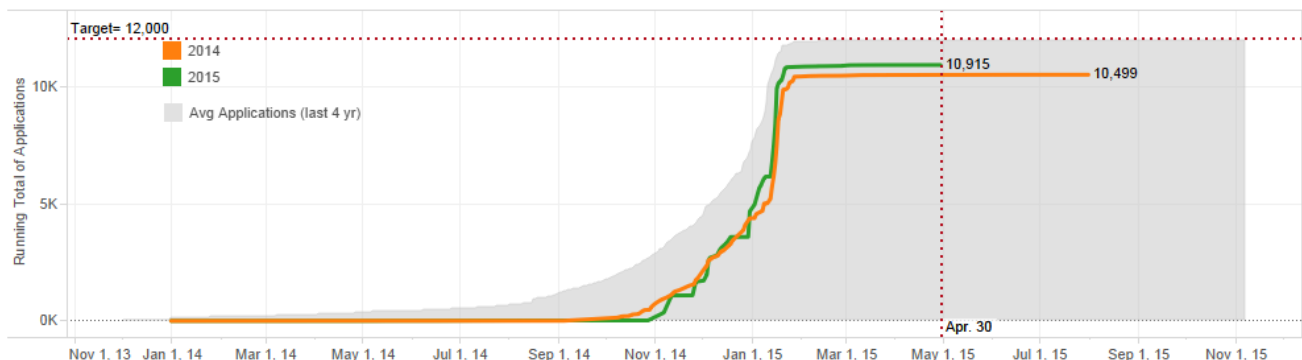
- For:* Enrollment Decision Makers  
*Who:* Would like to understand an access Enrollment information easily  
*The:* Enrollment Management Dashboard  
*Is an:* Interactive and visualization tool  
*That:* Provides key information and metrics  
*Unlike:* Compiling data from different sources and merging them together in spreadsheets  
*This Product:* Can be accessed online or on mobile devices, is secure, and pulls data from the data warehouse

### New Features:

- **Application Dashboard**
  - The goal of this visualization is to show enrollment decision makers the status of applications as of a date they select. The count of applications is then compared against three historical numbers: applications from the previous year, the average number of applications for the last 4 years, and a target. Users can then assess whether applications are above or below target. They will also be able to see the year-over-year growth over 5 years.
  - Users have the ability to interact with the visualization using a number of different filters:
    - Option to count by number of applications or by the number of applicants
    - Ability to pick a term of interest (eg. 201503, 201601, etc)
    - Specify an “Applications as of” date
    - Specify a target number of applications or applicants.
    - Select College/s, Degree/s, Major/s, Student Level/s, Student Type/s, Admission Type/s, Gender, Ethnicity, Application Location/s, Campus/es

### Availability:

- Available for authorized users in Enrollment Management: [Enrollment Management – Student Applications](#).



(Sample screen shot)



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**Principal Investigators (PI) Dashboard**  
**Release 5**

**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 Report:**

- **Expenditures in Suspense**
  - This report was developed to help monitor expenditures that have been charged to a suspense account **that have not been cleared.**
  - Users will be able to view expenditures in suspense using different filters:
    - Search by Suspense Project, Suspense Task and Suspense Award numbers
    - Search by PI's with expenditures in suspense
    - Search by Research Service Coordinator (RSC)
    - Search by Org

**Availability:**

- Accessible through OVPR's website under the "More Tools" tab: <http://research.gwu.edu/pi-dashboard>



**Manual Registration  
 Release 5**

**Product Vision**

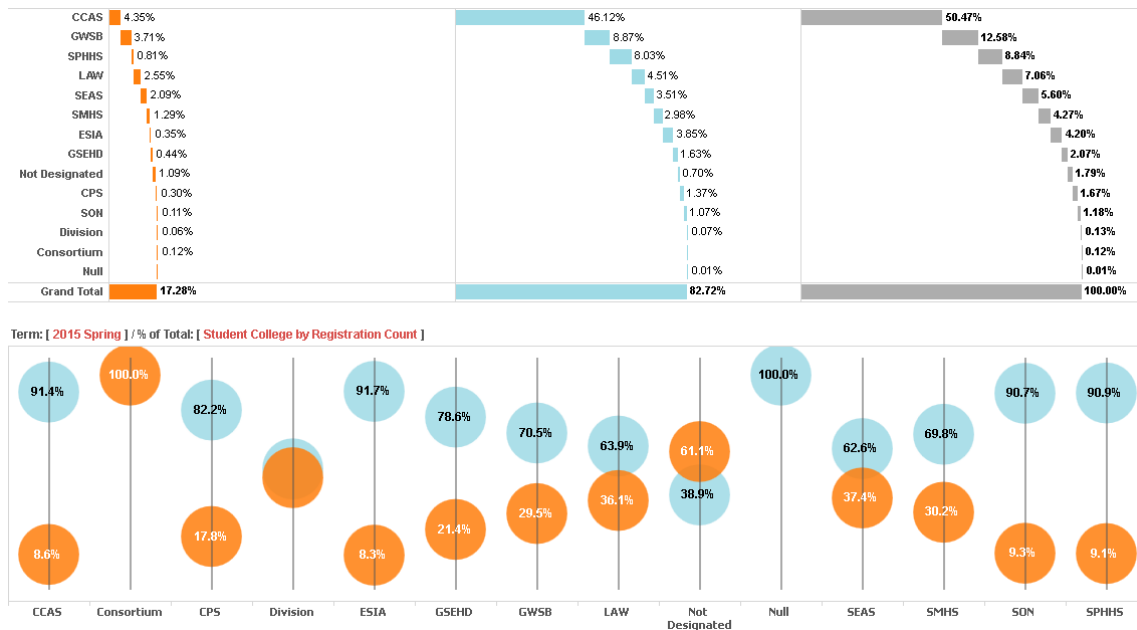
- For:* The Registrar's Office
- Who:* Would like to analyze the volume of manual registrations being done by their Office
- The:* Manual Registration fact table
- Is an:* Additional component of the Student Data Mart
- That:* Will allow them to report inefficiencies and implications of manual registrations
- Unlike:* Pulling data directly from Banner using SQL
- This Product:* Will allow them to build reports and gain insight into this process so that the number of manual registrations can be reduced in the long run

**New Visualization:**

- **Registration Activity visualization**
  - The Registration Activity visualization shows the volume of manual registration activity vs. self-service registration by term. Users can filter the data by term, by Student College, by Course College and by Degree Level.
  - This new visualization gives the Registrar's Office a complete picture of all registration activity. Other tabs that were completed in an earlier release allow the Registrar to analyze manual registrations.

**Availability:**

- Accessible through the Registrar's website for authorized users: <http://registrar.gwu.edu/dashboards>



(Sample screen shot)



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**BIS Strategic Initiatives**

**Tableau Server upgrade:**

- To avail of the latest features, Tableau Server has been upgraded from 8.2 to 8.3. Desktop users are advised to upgrade to 8.3 especially if the workbook will be published on the server.

**Student Accounts:**

- To allow users to reconcile to the Banner table TBRACCD, a new fact table was created that does not apply payments. The data can be queried through Query Studio and Report Studio through the data warehouse [gsource.gwu.edu](http://gsource.gwu.edu) by authorized users.