2012 Administrative Leadership Conference

Reporting and Analysis Highlights

October 24, 2012

Workshop Presenter(s)

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  AITS: Decision Support

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Please…

- Turn off cell phones.
- Avoid side conversations.
- Ask Questions at any time
- Sign the attendance roster.
- Complete the evaluation at the end of the workshop.

Workshop Objectives

- Review purpose and strengths of reports and analysis tools
- Overview of Excel-based tools for performing analysis of expenditures as well as associated employee FTE and headcounts
- Highlight report resources

Information Toolbox

- Reports
  - Answer a specific question
  - Can be reoccurring or one-time
  - Have an expectation of the answer
  - Often are very detailed listings
  - Help answer: Who, What, When, Where, How Much?
  - Generally detail what has already happened

Information Toolbox

- Analysis
  - Answer a family of questions - conversation
  - Assist in identifying outliers and exceptions
  - Enable exploration and trending over time
  - Iterative process: one question leads to another
  - Often summarized
  - Can create insight: Why or What might

Information Toolbox

- Dashboards
  - Visual information more easily consumed
  - Illustrates patterns or relationships
  - Enable monitoring of pre-determined items or areas of interest
  - Usually summarized

Review Information Resources

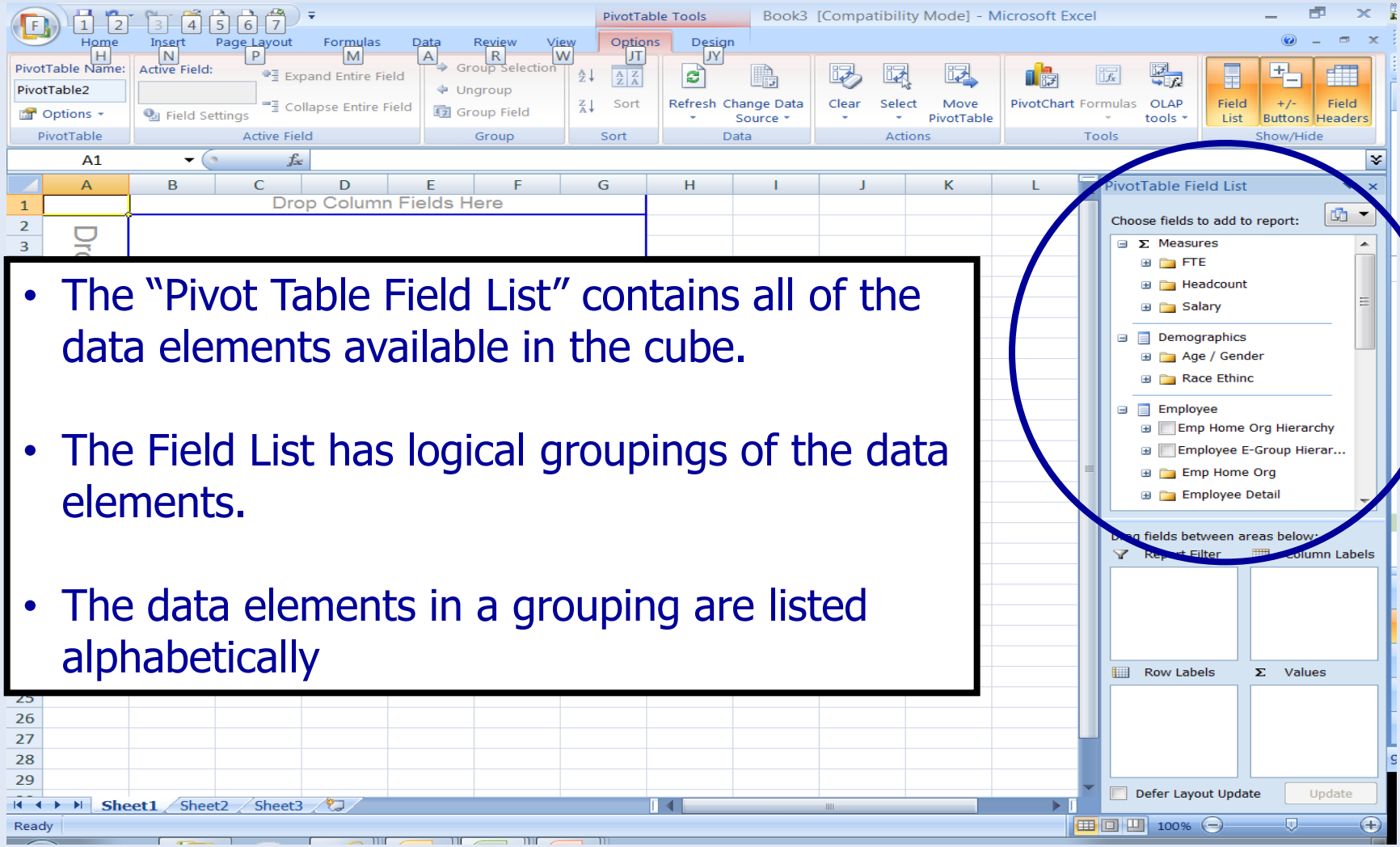
- Reports
  - ViewDirect – point in time
  - EDDIE – refreshable on demand
  - Solution Library & QCH – Business Objects
- Analysis or OLAP (on-line analytical processing)
  - Expense Trends – Microsoft Excel
  - Employee FTE/HC – Microsoft Excel

The Cubes

Terminology

- Analysis or Cubes or OLAP (on-line analytical processing)
  - A product that allows you to easily interact with, summarize and review data. This activity is often referred to as ‘slicing and dicing’.
  - What are the advantages of putting data in a cube?
    - Faster and more responsive for exploration
    - Intuitive summarization of data
    - Packaged for trending, analysis, and identification of outliers
    - Quick filtration to reveal insights

OLAP Cubes in Excel



- The "Pivot Table Field List" contains all of the data elements available in the cube.
- The Field List has logical groupings of the data elements.
- The data elements in a grouping are listed alphabetically

OLAP Cubes in Excel

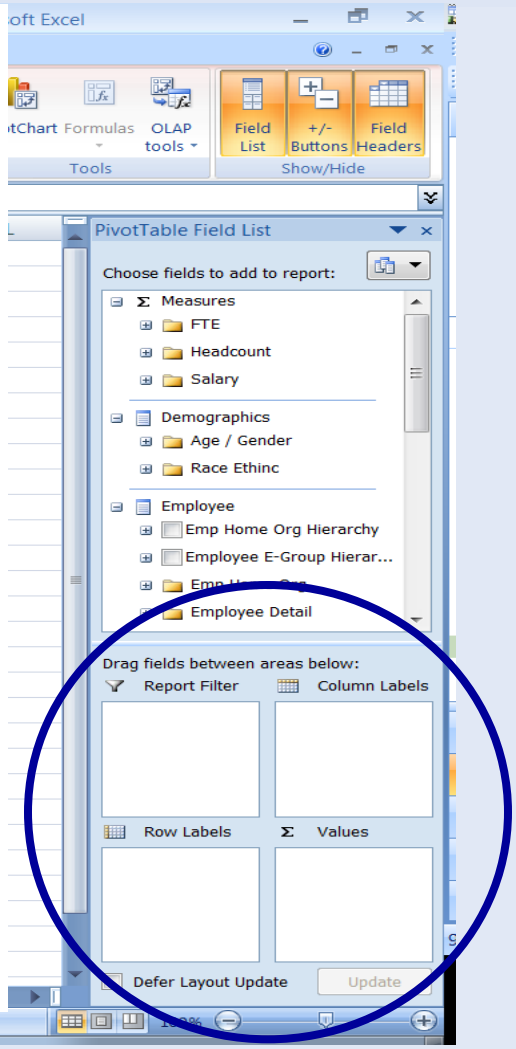
- To analyze data, you put objects in one of the four sections in the bottom right hand corner.

1. Report Filter – It is a good idea to start filtering your selections, before displaying them. Filters appear as drop downs lists in the upper left hand corner of the excel worksheet.

2. Column Labels – This will put the field across the top of as columns. Time is often a good column choice for trending.

3. Row Labels –When you click on the box in front of an field, it is automatically placed in the Row Label section.

4. Values – Measures are put here. These are things you count or sum.



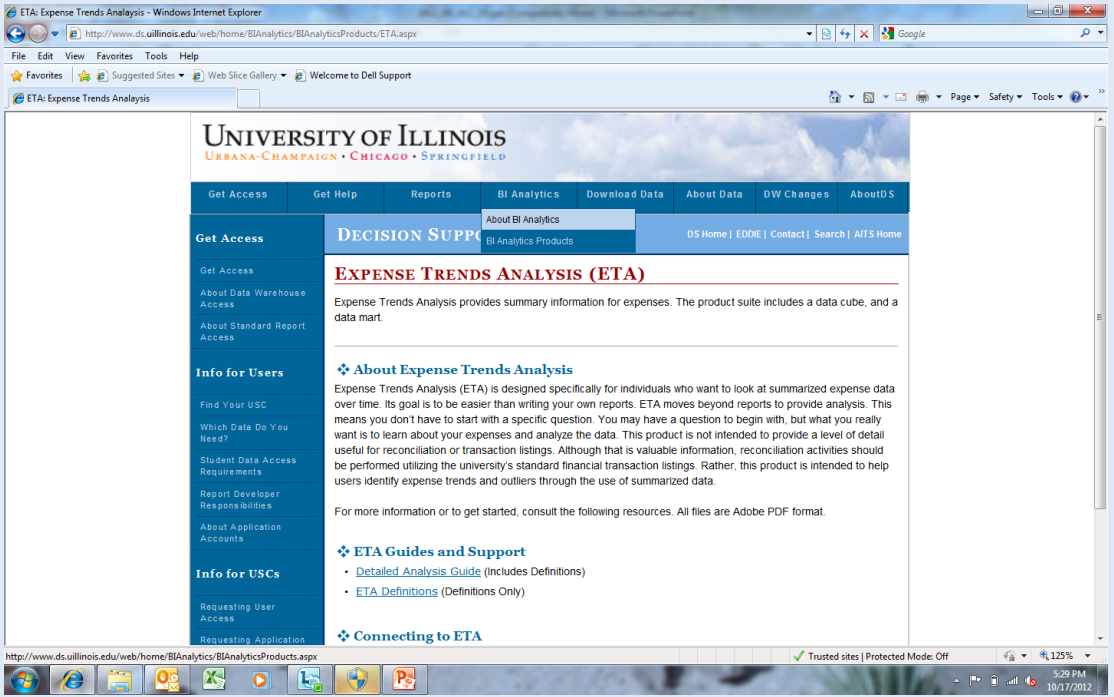
Expense Trends cube

- Purpose: to analyze your expenses and look for trends
- What's in it:
  - Expenses only
  - Current FY and previous five
  - Limited employee/job/position information
  - Vendor names

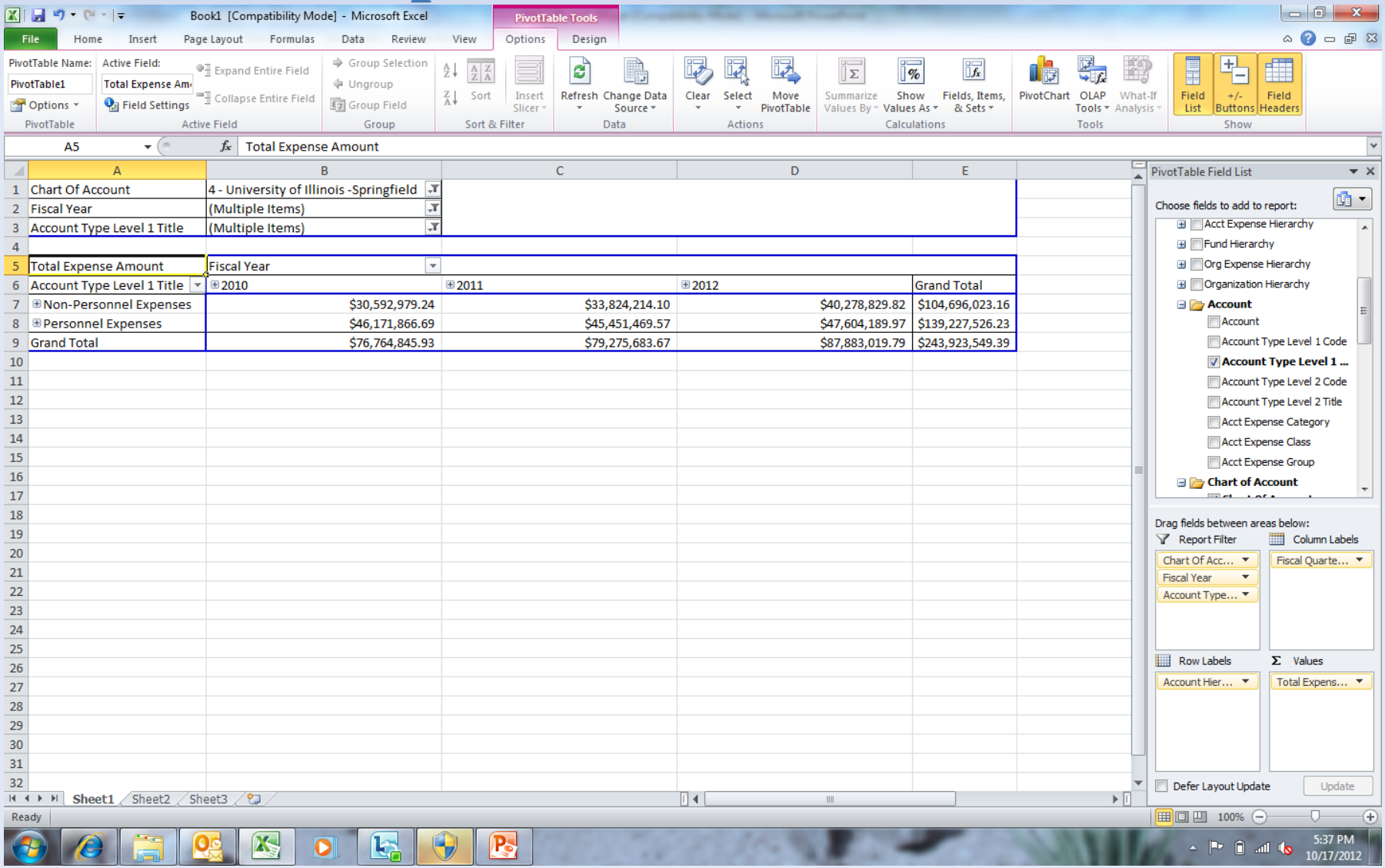
Expense Trends cube

- How often is it updated?
  - Monthly
- Where can I find out more information?

http://www.ds.uillinois.edu/web/home/BIAnalytics/BIAnalyticsProducts/ETA.aspx



Expense Trends cube



Employee FTE/HC cube

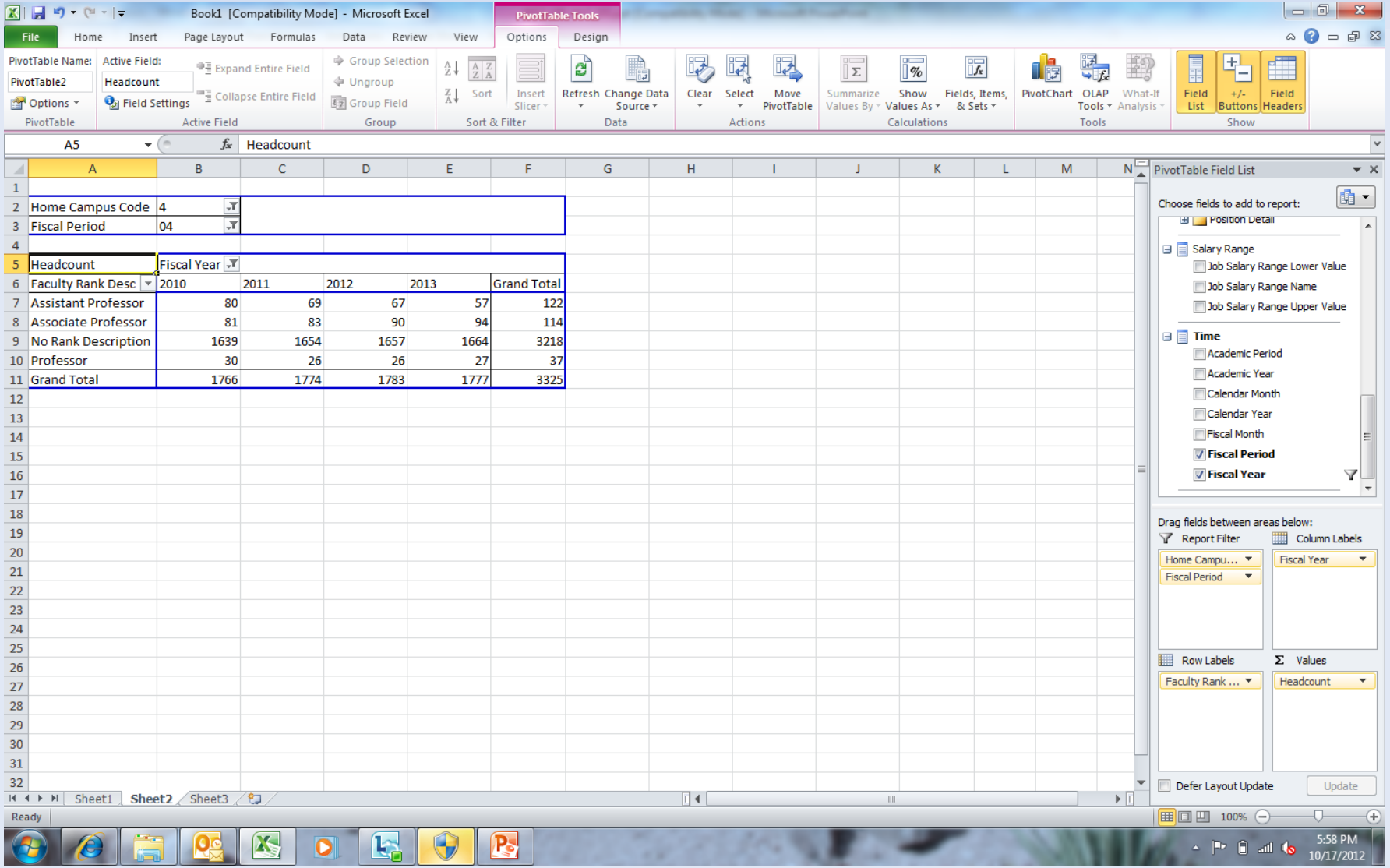
- Purpose: to analyze look for trends in employee FTE and headcount
- What's in it:
  - Employee and job information (non terminated jobs)
  - 10 years of data – 2004 to current
  - Employee groups, Salary, Tenure, Rank
  - Faculty Information: Tenure Rank

Employee FTE/HC cube

- How often is it updated?
  - Monthly (on the 10th day of the month)
- Where can I find out more information?

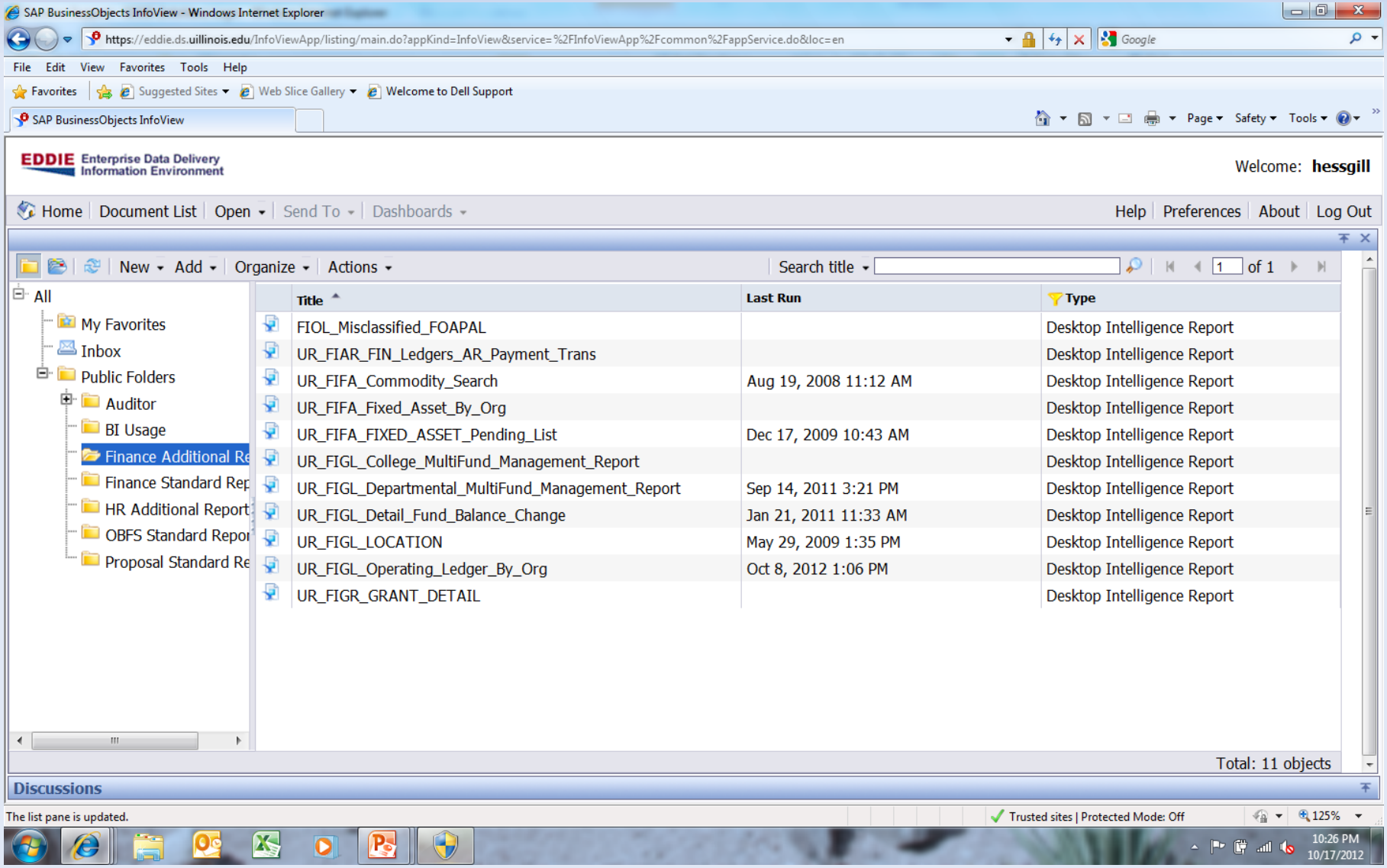
http://www.ds.uillinois.edu/web/Home/BIAnalytics/BIAnalyticsProducts/HeadcountAnalysis.aspx

Employee FTE/HC cube



Reporting

EDDIE


SAP BusinessObjects InfoView - Windows Internet Explorer
https://eddie.ds.uillinois.edu/InfoViewApp/listing/main.do?appKind=InfoView&service=%2FInfoViewApp%2Fcommon%2FappService.do&loc=en
File Edit View Favorites Tools Help
Favorites Suggested Sites Web Slice Gallery Welcome to Dell Support
SAP BusinessObjects InfoView
EDDIE Enterprise Data Delivery Information Environment
Welcome: hessgill
Home Document List Open Send To Dashboards Help Preferences About Log Out
New Add Organize Actions Search title 1 of 1
All
My Favorites
Inbox
Public Folders
Auditor
BI Usage
Finance Additional Re
Finance Standard Rep
HR Additional Report
OBFS Standard Repor
Proposal Standard Re
Title Last Run Type
FIOL_Misclassified_FOAPAL Desktop Intelligence Report
UR_FIAR_FIN_Ledgers_AR_Payment_Trans Desktop Intelligence Report
UR_FIFA_Commodity_Search Aug 19, 2008 11:12 AM Desktop Intelligence Report
UR_FIFA_Fixed_Asset_By_Org Desktop Intelligence Report
UR_FIFA_FIXED_ASSET_Pending_List Dec 17, 2009 10:43 AM Desktop Intelligence Report
UR_FIGL_College_MultiFund_Management_Report Desktop Intelligence Report
UR_FIGL_Departmental_MultiFund_Management_Report Sep 14, 2011 3:21 PM Desktop Intelligence Report
UR_FIGL_Detail_Fund_Balance_Change Jan 21, 2011 11:33 AM Desktop Intelligence Report
UR_FIGL_LOCATION May 29, 2009 1:35 PM Desktop Intelligence Report
UR_FIGL_Operating_Ledger_By_Org Oct 8, 2012 1:06 PM Desktop Intelligence Report
UR_FIGR_GRANT_DETAIL Desktop Intelligence Report
Total: 11 objects
Discussions
The list pane is updated.
Trusted sites | Protected Mode: Off
125%
10:26 PM
10/17/2012

EDDIE

- Recent Finance Reports
  - UR_FIGL_Departmental_Multifund_Management_Report
  - UR_FIGL_College_Multifund_Management_Report
  - UR_FIGR_Grant_Detail

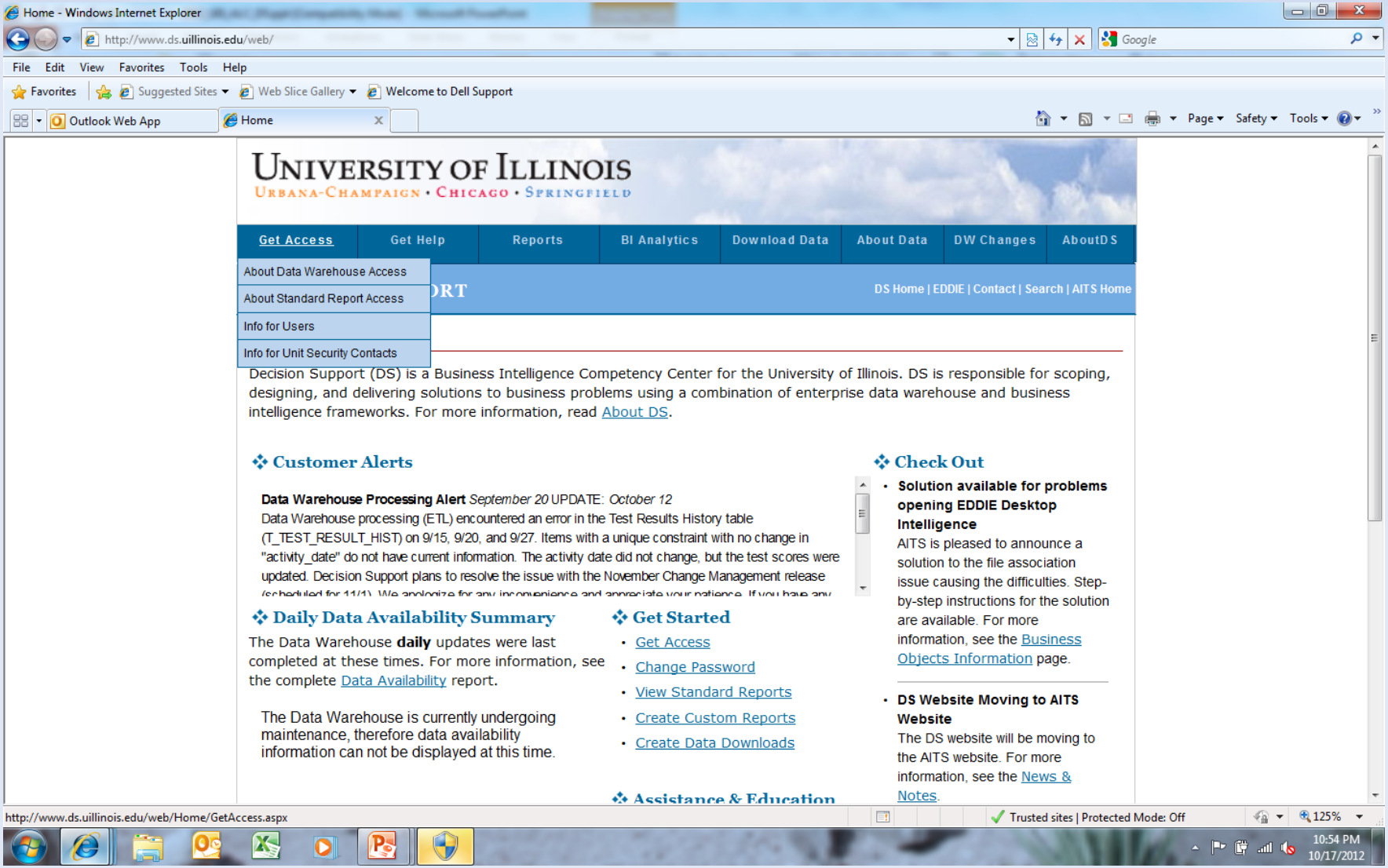
EDDIE

- Multifund Management reports
  - Management overview of most fund types
  - Review college/departmental fund balances
  - Summary of balances across fund types for a particular 3-digit organization code, fiscal year, and fiscal period
  - Additional tabs in the report provide more detail for each fund type, including: State and ICR budget balance available, revolving funds, gift funds, and grant funds.

EDDIE

- One Grant detail
  - Research Administrators or Investigators who manage grants
  - Focuses on a single grant code including detailed transaction as well as summary information
  - Multi-tab report package containing Inception To Date, Personnel and Non-Personnel summaries across account types for a particular grant code
  - Additional tabs in the report provide transaction detail as well as projections.

Get Access


Home - Windows Internet Explorer
http://www.ds.uillinois.edu/web/
File Edit View Favorites Tools Help
Favorites
Suggested Sites
Web Slice Gallery
Welcome to Dell Support
Outlook Web App
Home
Page
Safety
Tools
UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD
Get Access
Get Help
Reports
BI Analytics
Download Data
About Data
DW Changes
AboutDS
About Data Warehouse Access
About Standard Report Access
Info for Users
Info for Unit Security Contacts
DS Home | EDDIE | Contact | Search | AITS Home
Decision Support (DS) is a Business Intelligence Competency Center for the University of Illinois. DS is responsible for scoping, designing, and delivering solutions to business problems using a combination of enterprise data warehouse and business intelligence frameworks. For more information, read About DS.
Customer Alerts
Data Warehouse Processing Alert September 20 UPDATE: October 12
Data Warehouse processing (ETL) encountered an error in the Test Results History table (T_TEST_RESULT_HIST) on 9/15, 9/20, and 9/27. Items with a unique constraint with no change in "activity_date" do not have current information. The activity date did not change, but the test scores were updated. Decision Support plans to resolve the issue with the November Change Management release
Check Out
Solution available for problems opening EDDIE Desktop Intelligence
AITS is pleased to announce a solution to the file association issue causing the difficulties. Step-by-step instructions for the solution are available. For more information, see the Business Objects Information page.
DS Website Moving to AITS Website
The DS website will be moving to the AITS website. For more information, see the News & Notes.
Daily Data Availability Summary
The Data Warehouse daily updates were last completed at these times. For more information, see the complete Data Availability report.
The Data Warehouse is currently undergoing maintenance, therefore data availability information can not be displayed at this time.
Get Started
Get Access
Change Password
View Standard Reports
Create Custom Reports
Create Data Downloads
Assistance & Education
http://www.ds.uillinois.edu/web/Home/GetAccess.aspx
Trusted sites | Protected Mode: Off
125%
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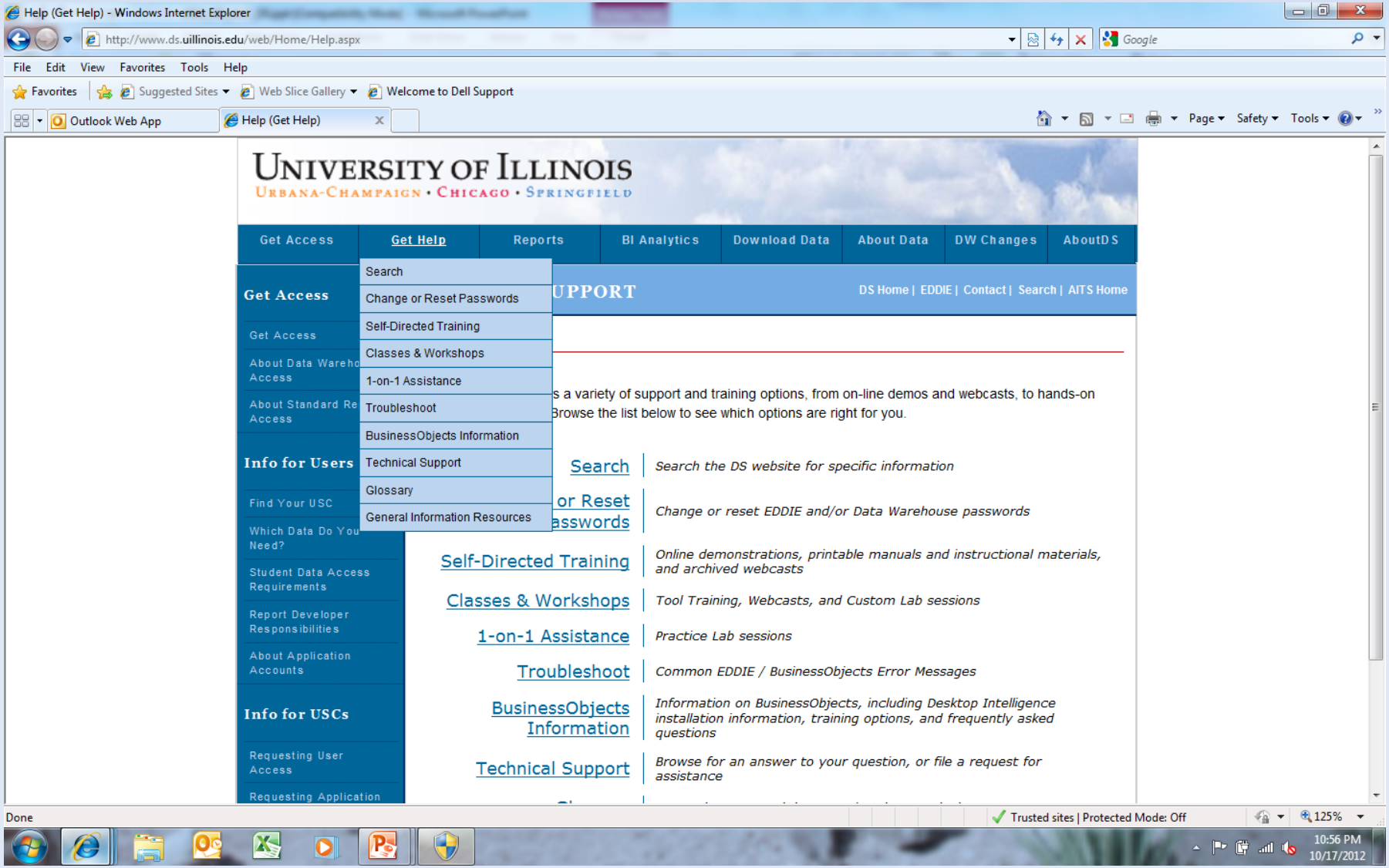
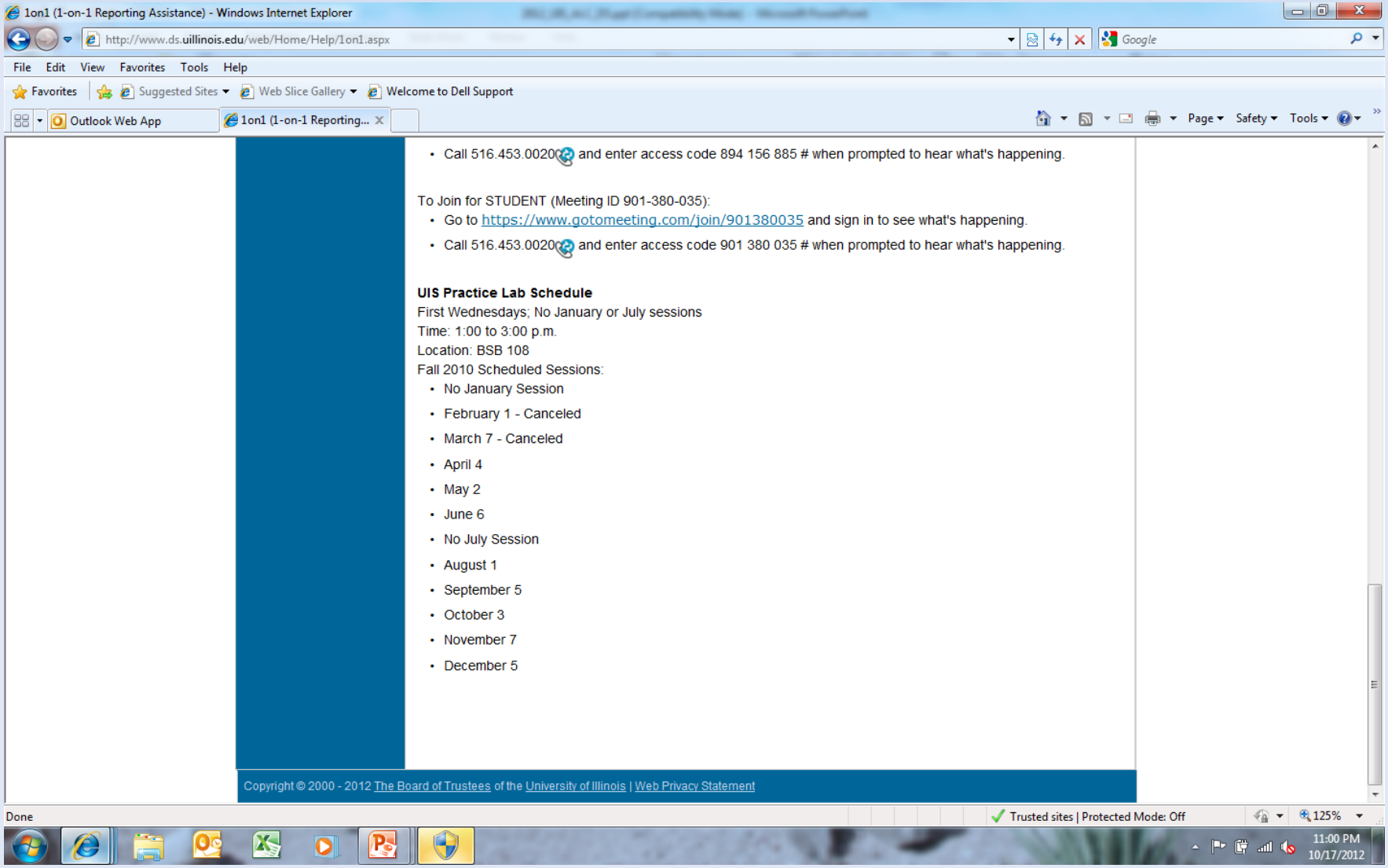
10/17/2012

Get Training



Get Help


1on1 (1-on-1 Reporting Assistance) - Windows Internet Explorer
http://www.ds.uillinois.edu/web/Home/Help/1on1.aspx
File Edit View Favorites Tools Help
Favorites
Suggested Sites
Web Slice Gallery
Welcome to Dell Support
Outlook Web App
1on1 (1-on-1 Reporting...
Page
Safety
Tools
• Call 516.453.0020 and enter access code 894 156 885 # when prompted to hear what's happening.
To Join for STUDENT (Meeting ID 901-380-035):
• Go to https://www.gotomeeting.com/join/901380035 and sign in to see what's happening.
• Call 516.453.0020 and enter access code 901 380 035 # when prompted to hear what's happening.
UIS Practice Lab Schedule
First Wednesdays; No January or July sessions
Time: 1:00 to 3:00 p.m.
Location: BSB 108
Fall 2010 Scheduled Sessions:
• No January Session
• February 1 - Canceled
• March 7 - Canceled
• April 4
• May 2
• June 6
• No July Session
• August 1
• September 5
• October 3
• November 7
• December 5
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Trusted sites | Protected Mode: Off
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10/17/2012

Get Help

- Contact the AITS Service Desk (ask for Decision Support)
  - Email at: servicedeskaits@uillinois.edu
- Contact AITS-Decision Support
  - Email at: dsusersupportspecialists@uillinois.edu

Helpful People

- Michelle Bergman – Functional Area Coordinator – Student: bergman@uillinois.edu
- Mandy Bodine – Functional Area Coordinator – Finance

  abodine@uillinois.edu

- Eddie Lee – User Support Specialist

  edwinlee@uillinois.edu

Remember: Decision Support is on campus on the first Wednesday of every month in BSB 108.

Additional Resources

- To learn more about using Pivot Tables in Microsoft Excel
  - go.uis.edu/lynda

Questions?