UDW+ ROADSHOW FOR POLY
PROGRAM SERVICES OFFICE
SEPTEMBER 10TH, 2013
AGENDA

• What is the UDW+ Program and the Financial Reporting and Analytics Project?
• Sneak Preview of UDW+ Dashboards and Standard Reports
• UDW+ Training Program
• Decision Support Group
• Q & A
WHAT IS UDW+ AND THE FINANCIAL REPORTING AND ANALYTICS PROJECT?
What is UDW+?

The **University Data Warehouse Plus is a Program** aimed at:

- Establishing Decision Support Services around reporting and analytics.
- Rebuilding existing University Data Warehouse architecture for more intuitive and integrated access to University data.
- Formalizing Data Management Policies and Practices that ensure integrity and accessibility.
- Building a detailed and well executed ongoing internal Training Program.
- Over time, the UDW+ will replace the current University Data Warehouse architecture.

What is OBIEE?

- OBIEE will replace the current Brio reporting tool.
- The **Oracle Business Intelligence Enterprise Edition** is a reporting tool that pulls data from the UDW+ to deliver a full range of reporting and analytical capabilities including interactive dashboards, full ad hoc capabilities, alerts, and reports.
UDW+ Architecture Overview

- Dashboards
- Interactive Reports
- Ad-Hoc
- Alerts

Reporting (OBIEE)

University Data Warehouse (UDW+)

Finance
- (FAME, DRM & Post Award Research)

Departmental Metrics
- (Multiple Sources)

Human Resources
- (HRIS)

Student
- (SIS/Albert)

Pre-Award Grants Management
- (InfoEd & Cayuse)

Fundraising & Alumni Relations
- (Advance)

Capital Projects Management
- (CPACS)

Others
- (TBD)

Financial Reporting & Analytics Rollout

Transactions
WHO NEEDS WHAT FINANCIAL INFORMATION

Deans/Department Head
- Financial Indicators dashboard
- Departmental Metrics Dashboard

Fiscal Officers
- Financial Operations Dashboard
- Comparative Analysis Dashboard
- Standard Interactive Reports

Department Administrators
- Financial Operations Dashboard
- Standard Interactive Reports

Managers

Financial Operations Dashboard

Principal Investigators

Grants Management Dashboard (for PI)

Grant Administrators
- Grants Management Dashboard (for Grants Admin)
- Standard Interactive Reports

- Person can choose to have access to any dashboard(s) and/or report(s)
- Data that displays is based on chartfield access
- Training is Mandatory
SNEAK PREVIEW OF UDW+
The Financial Dashboards are expected to meet 80% of your financial reporting and analytics needs.

Schools/divisions are expected to develop custom ad hoc reports and/or dashboards to meet the remaining 20% of their specific reporting needs.
**Target Audience**
- Financial reporting users who have a responsibility to maintain and manage a budget, such as:
  - Fiscal Officers
  - Department Administrators

**Dashboard Purpose**
- Manage budgets, see transaction details.
- Users who track balances and budgets as well as activity through the Accounts Payable pipeline.
All Dashboard pages include links to “About this dashboard” and “About this page”. These links take you to a Wiki page that contains relevant information about the data, definitions, reports, available drills, use notes and target audience.
Balance Overview page shows a glance at all your activity across all your funds.

Reports are grouped to respect Budget Control rules.

Expandable Account Hierarchy

Drill to transaction detail
Balance Detail for a specific budget

Additional sections showing Project Details, Fund Balance, Endowment Value, and Open Advances (when applicable)

Drill to transaction detail
The Vendor Search page displays AP related information for a vendor. Showing vendor transactions from purchasing to payment.

Purchase Orders

- Invoices Processed with drill to detail

Payments

- Payments Issued
The PO Search page shows information for a specific Purchase Order.

View PO details, including descriptions and balances.
**GRANTS MANAGEMENT DASHBOARD**

**Target Audience**
- Principal Investigator
- Grants Administrator

**Dashboard Purpose**
- The Grants Management Dashboard provides useful financial information for managing Grants and their budgets.
- This Dashboard includes all of the budget, expense and encumbrances transactions throughout the life of a grant.
- Users can track grant expenditures by project, across PIs, across departments, and across time periods other than NYU fiscal years.
The PI Summary page answers the question: “How much money is left on my projects?”

### Cost Sharing by Project
- **Project**: Can drill to detail (such as Total Projected Indirect Cost).

### Expected award amount by grant year

### Dollar amount left to spend

#### How Much Money Is Left on My Projects?

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Award #</th>
<th>Project</th>
<th>PI</th>
<th>Cost Share</th>
<th>Project Start Date</th>
<th>Project End Date</th>
<th>Total Anticipated Budget</th>
<th>Total Authorized Budget</th>
<th>Committed Dollars</th>
<th>Remaining Balance</th>
<th>% of Budget Remaining</th>
<th>Low Budget</th>
</tr>
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<tbody>
<tr>
<td>Motorola Mobility Foundation</td>
<td>LETTER DATED 05/21/12</td>
<td>Technology Innovation Empowerment</td>
<td>N</td>
<td>Plass, Jan</td>
<td>8/1/2012</td>
<td>9/30/2012</td>
<td>15,000.00</td>
<td>10,000.00</td>
<td>0.00</td>
<td>10,000.00</td>
<td>100%</td>
<td>-</td>
</tr>
<tr>
<td>National Science Foundation</td>
<td>CMRF-0957834</td>
<td>P6833 - Structural DNA Nanotechnology</td>
<td>Y</td>
<td>Ward, Michael</td>
<td>10/1/2010</td>
<td>9/30/2013</td>
<td>1,471,680.00</td>
<td>985,120.00</td>
<td>907,916.77</td>
<td>75,203.23</td>
<td>7%</td>
<td>-</td>
</tr>
<tr>
<td>National Science Foundation</td>
<td>DMR-0558769</td>
<td>P6-935 - Crystalline Encapsulation</td>
<td>N</td>
<td>Ward, Michael</td>
<td>6/1/2009</td>
<td>5/31/2013</td>
<td>520,000.00</td>
<td>413,335.33</td>
<td>249,318.12</td>
<td>64,048.21</td>
<td>15%</td>
<td>-</td>
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<tr>
<td>National Science Foundation</td>
<td>DMR-1206337</td>
<td>J767 - GOAL: Design of Crystal Growth</td>
<td>N</td>
<td>Ward, Michael</td>
<td>6/15/2012</td>
<td>5/31/2015</td>
<td>480,000.00</td>
<td>106,666.67</td>
<td>17,266.77</td>
<td>46,139.98</td>
<td>8%</td>
<td>-</td>
</tr>
<tr>
<td>New York Hall of Science</td>
<td>S2855 - DIP: Interaction Research in C</td>
<td></td>
<td>N</td>
<td>Plass, Jan</td>
<td>1/1/2012</td>
<td>12/31/2014</td>
<td>140,141.00</td>
<td>50,077.33</td>
<td>40,224.45</td>
<td>9,852.88</td>
<td>20%</td>
<td>-</td>
</tr>
</tbody>
</table>

#### Flagged Projects
- Additional sections to flag projects that are either at risk, with exceptions, or coming to an end within 90 days.

#### Projects Coming to an End

#### Projects with Exceptions
The Expense Breakdown page profiles expenses for a specific project.

F7067 - GOALI: Design of Crystal Growth

Sponsor: NATIONAL SCIENCE FOUNDATION
PI: WARD, MICHAEL
Award #: DMR-1206337
Current Overhead Rate: 54%
Sponsor Fringe Rate: 28%
Project Start: 6/15/2012
Project End: 5/31/2015
Overhead Accounts: Click Here

Financial information grouped by expense accounts, with optional drills to detail.
The Grants Budget Detail page shows financial information for a specific project viewable in FY, Grant Year, or Calendar Year.

View spending by Fiscal Year, Grant Year or Calendar Year.

Financial information grouped by time, with optional drills to detail.
Grants Administrators can also view aggregated financial information using the following pages of the Dashboard:
- Grants by Fund
- Grants by Org
- Grants by PI
FINANCIAL INDICATORS DASHBOARDS

Target Audience
- Deans
- Division Heads
- Department Heads
- Department Chairs

Dashboard Purpose
- The Financial Indicators Dashboard gives quick access to summary metrics of financial activity, generally in graphical form, to oversee the financial performance of a school, division or department.
- It represents summary data using graphs and complements the details available in other Dashboards.
The Summary page profiles year-to-date revenue and expense.

Revenue and Expense as compared to same time in prior years (when data is available).
The Tuition page profiles tuition revenue, by student type, over time and compared to budget.

### Tuition Revenue by Student Type

<table>
<thead>
<tr>
<th>Student Type</th>
<th>FY10</th>
<th>FY11</th>
<th>FY12</th>
<th>FY13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>269,916</td>
<td>224,864</td>
<td>235,196</td>
<td>225,708</td>
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<tr>
<td>Graduate</td>
<td>51,661</td>
<td>53,172</td>
<td>52,044</td>
<td>51,380</td>
</tr>
<tr>
<td>Doctorate</td>
<td>51,661</td>
<td>53,172</td>
<td>52,044</td>
<td>51,380</td>
</tr>
<tr>
<td>Other</td>
<td>197</td>
<td>198</td>
<td>196</td>
<td>218</td>
</tr>
</tbody>
</table>

### Undergraduate Tuition Discount Rate

<table>
<thead>
<tr>
<th>Year</th>
<th>Discount Rate</th>
</tr>
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<tbody>
<tr>
<td>FY10</td>
<td>19%</td>
</tr>
<tr>
<td>FY11</td>
<td>19%</td>
</tr>
<tr>
<td>FY12</td>
<td>18%</td>
</tr>
<tr>
<td>FY13</td>
<td>17%</td>
</tr>
</tbody>
</table>

### View

- Undergraduate Gross Tuition, Net Tuition, and the Discount Rate.
- Can also view Balance of Trade accounting information.
The Endowment page profiles Expendable Endowment Income (Fund 21) and Endowment Fund Balances (Funds 40-46).

View your Endowment Market Value by Purpose and/or Type.

Compare your Endowment Market and Book Value to prior years and see changes.
The Sponsored Programs page profiles sponsored program expense (in Funds 24, 25 and 73) and activity.

View trend in spending, by specific areas within division.

Sponsored Program Expenses by purpose, sponsor, or type.

Can also view direct and indirect expense.
The Capital Projects page profiles summary information on active capital projects.

Amount spent on Debt Service

Amount spent on specific capital projects, and balance remaining.
Target Audience
- Fiscal Officers
- Fiscal Analysts
- Department Administrator
- General Financial Reporting Users

Dashboard Purpose
- The Comparative Analysis Dashboard is intended to provide users with the ability to trend and forecast financial information.
- This Dashboard primarily uses aggregate year-to-date and monthly data.
- Users can analyze financial measures such as Budget, Actual and Balance by Time (Fiscal Years and Accounting Period), Account Program and Project.
- Analysis can be performed using the various levels of the Account and Org hierarchies.
Target Audience

- All Financial Reporting Users

A variety of Interactive Standard Reports are available for quickly locating budget, fund balance, and accounts payable information.

**Standard Reports include:**

- Budget Summary and Detail Reports
- Budget Control Reports
- Fund Balance and Change in Funds Reports
- Project Summary Report
- Accounts Payable and Purchase Order Reports
- Budget Exceptions Report
- Salary Expense Reports
Interactive Standard Reports include different Roll-up options.

Budget Summary Report

Run Date: 2/8/2013
Run Time: 2:53:23
Run By: Transit
UDW+ current as of: 01/25/2013 12:28:21

Business Unit: WSQ01 - NYU Washington Square
Fiscal Year: 2013
Period: January
Currency: US Dollar

<table>
<thead>
<tr>
<th></th>
<th>Account</th>
<th>Original Budget (A)</th>
<th>Revised Budget (B)</th>
<th>Current Month (C)</th>
<th>Year To Date (D)</th>
<th>Encomium (E)</th>
<th>Balance (B-E)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td></td>
<td>0.00</td>
<td>141,040.00</td>
<td>141,040.00</td>
<td>141,040.00</td>
<td>141,040.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Subtotal Revenue</td>
<td></td>
<td>0.00</td>
<td>175,440.00</td>
<td>195,973.33</td>
<td>195,973.33</td>
<td>195,973.33</td>
<td>0.00</td>
</tr>
<tr>
<td>Total Revenue</td>
<td></td>
<td>0.00</td>
<td>175,440.00</td>
<td>195,973.33</td>
<td>195,973.33</td>
<td>195,973.33</td>
<td>0.00</td>
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<tr>
<td>Personnel Expense</td>
<td>51100 - Salaries - Admin, Mgmt FT</td>
<td>85,378.00</td>
<td>85,378.00</td>
<td>28,459.33</td>
<td>56,918.67</td>
<td>0.00</td>
<td></td>
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<tr>
<td>Subtotal Personnel Expense</td>
<td>1,099,259.99</td>
<td>1,148,570.99</td>
<td>16,381.86</td>
<td>1,874,123.47</td>
<td>1,874,123.47</td>
<td>1,874,123.47</td>
<td>30,796.27</td>
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<tr>
<td>OITS</td>
<td>60120 - Honorariums</td>
<td>165.67</td>
<td>165.67</td>
<td>165.67</td>
<td>165.67</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Expenses</td>
<td>60900 - Royalties</td>
<td>165.67</td>
<td>165.67</td>
<td>165.67</td>
<td>165.67</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Subtotal Expenses</td>
<td>333.33</td>
<td>333.33</td>
<td>62.63</td>
<td>62.63</td>
<td>62.63</td>
<td>62.63</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Can drill-down to details on hyperlinked values
**Target Audience**
- Advanced financial reporting users who would like to create and share custom ad hoc reports (Super Users).

**Purpose**
- Users have the ability to build custom ad hoc reports to meet the specific financial reporting and analysis needs of their school/division.
- Ad hoc reports can be created with basic and complex analysis, adding graphs, formatting reports, as well as other advanced functions of the reporting tool.
User-friendly reporting tool that allows you to easily construct a custom query by adding columns and filters for use in reports, tables, graphs, and dashboards.

Tool tips that provide metadata about each fact and dimension.
UDW+ TRAINING PROGRAM
Ongoing Training Offerings

**eLearning:**
- **Target Audience:** all Dashboard and Interactive Standard Report users (Department users)
- Courses designed to be specific to the user's role and responsibilities
- Assessment must be completed to be granted access to UDW+
- Duration is approximately 30 minutes per Dashboard

**Supplemental Open Learning Labs:**
- **Target Audience:** Dashboard and Interactive Standard Report users who need additional training following eLearning
- Facilitated Learning Labs where users can ask questions and get hands-on practice
- Customized department-led follow-up training and/or workshop
- Tips and Tricks

**Classroom Training**
- **Target Audience:** all Ad Hoc Reporting users
- Required for Ad Hoc access
- eLearning prerequisite
- Duration is 4.5 hours

**Subject Area Workshops**
- **Target Audience:** Ad Hoc Reporting user focusing on a specific Subject Area
- Led by Subject Matter Experts in each of the Subject Areas for Ad Hoc reporting
- One-on-one time with SME to develop custom Ad Hoc Reports
- Classroom Training prerequisite
- Duration is 1 hour or more, depending on

**One-on-One Training**
- **Target Audience:** Executive level users (Deans)
- Scheduled as necessary with Division
- Division Super User should be present
- One-on-One Training Replaces eLearning

**Virtual Instructor Led Training**
- **Target Audience:** all UDW+ users who would like additional training or support, following the completion of the initial training requirement
- Refresher training
- Optimization/enhancement training
- One-on-one support
- Users in distant locations

**Community Collaboration (Ad Hoc Reporting Users' Forum):**
- **Target Audience:** Ad Hoc Reporting users
- Share ideas amongst units for Ad Hoc Reports that were created to meet specific needs
- Share reporting challenges and solutions
- Blog / Wiki
You will soon receive an email from Peggy Chen with UDW+ training instructions and next steps.

Instructions will include:

- How to login to NYU iLearn
- How to access the necessary UDW+ online training
- How to access and complete the corresponding Quiz.
- Schedule of supplemental learning labs

Upon training and quiz completion, access to UDW+ will be granted within five business days.

You will receive a welcome email containing UDW+ access and login information.

Attend a supplemental Open Learning Labs should you have any questions or wish to practice with a UDW+ facilitator.
DECISION SUPPORT GROUP
The mission of the DSG is to:

- Provide reporting and analytical assistance to the global UDW+ user community.
  - Respond to user incidents and requests.
  - Proactively disseminate data issues and solutions.
  - Work with multiple stakeholders to identify process changes that will improve data accuracy and efficiency.
- Provide eLearning and Classroom training on utilizing UDW+.
- Create a Knowledgebase containing essential information for understanding data in UDW+.
- Help users produce financial and University mission analyses.
HOW TO CONTACT THE DSG

Please contact the DSG for all UDW+ related questions.

Contact Information for the DSG:

• Email: askdsg@nyu.edu
• Phone: 212-998-2900
• Web: www.nyu.edu/datawarehouse and visit the Decision Support Group section
QUESTIONS?

Additional information about UDW+ is available at www.nyu.edu/datawarehouse