



Colleague Reporting and Operating Analytics 2.0: analytical Reports and Dashboards

Reporting and Operating Analytics List of Reports and Dashboards

Within the Reporting and Operating Analytics product, there are several reporting areas, each with a wealth of information available as template reports. The reports are organized by Colleague subsystem and grouped according to functional areas.

COLLEAGUE ADVANCEMENT (6 reports)

- **Campaign Performance Chart** - What are the best and worst campaign performers? What is the contribution trend in the past quarters?
- **Constituent Pledge Report** - Who has made a pledge and what are the pledge amounts? What is the remaining balance? Which sources and reunion classes are the constituents from?
- **Constituents Recognition Program Membership Detail** - What are the recognition awards given to each constituent?
- **Constituents Reunion Classes and Sources** - What are the reunion classes, sources, primary class and primary source for each constituent?
- **Contribution Charts** - Charts showing contribution by age, state, reunion class, source, contribution category, and campaign.
- **Recognition Program Membership Changes** - How many members were added or dropped from each recognition program since a certain date? Also list by membership status and recognition levels.

COLLEAGUE FINANCE (19 reports)

- **Accepted Purchase Order Report** - Question Answered: What is the total amount and value of what has been received by department, cost center, location, campus, and in a given time period of week, month, and year?
- **GL Account Available Balance** - What is the budget for the accounts and what is the remaining balance (including encumbered requisitions)? What is the encumbered balance?
- **GL Running Balance Report** –
- **GL Summary Analysis Report** - What money has been spent in what areas (accounts and segments)?
- **GL Transaction Detail by Date Range** - What type of transaction and from what sub-ledger is it from?
- **Outstanding BPO GL / Project Detail Report** - What are the currently open Blanket Purchase Orders and what are their current balances and total expenses? What projects are being funded from these BPOs and what GL Accounts are expenses being charged to?
- **Outstanding Requisition Totals by Vendor** - What are the outstanding amounts in requisition
- **Outstanding Voucher GL / Project Detail** - What are the currently outstanding Vouchers? What projects do they relate to? What GL Accounts are being drawn from for these Vouchers? **Outstanding Voucher GL / Project Detail** - What are the currently outstanding Vouchers? What projects do they relate to? What GL Accounts are being drawn from for these Vouchers?
- **Paid Voucher Report** - How many times has a vendor been paid in the last x number of months or years? What has been the total amount paid to a vendor in a given month or year?
- **PO GL / Project Detail Report** - What are the details of your Institution's Purchase Orders? Which Purchase Orders are Open or Cancelled? Which Purchase Order expenses relate to particular accounting Projects? What GL Accounts are being drawn from for these Purchase Orders?
- **Purchase Order Items Analysis Report** - What has been purchased? What orders are partially filled? Complete? Backordered? What are the outstanding amounts on order?
- **Purchase Orders Paid Amount** - Which requisitions or orders have been paid?
- **Recurring Voucher Item Detail** - What are the details of your Institution's Recurring Vouchers of particular statuses? Which specific items are being purchased under these Recurring Vouchers? How do they relate particular accounting Projects? What GL Accounts are being charged for these Recurring Vouchers?

- **Requisition GL / Project Detail Report** - What Requisitions exist for a specific Fiscal Year with specific statuses? For particular AP Types? Which specific items are being requisitioned? How do they relate particular accounting Projects and GL Accounts?
- **Voucher Items Purchased** - What has been purchased?
- **Voucher Amounts Due Report** - How much money is due to be paid in the next day, week, and month?
- **Voucher Items Analysis Report** - General questions about Vouchers
- **Voucher Outstanding Owed Amount Report** - How much money is owed to which vendors? Which are the vendors owed the most or above a given amount?
- **Voucher Vendor Payment Totals Report** - What has been the total amount paid to a vendor in a given month or year?

CORE (3 reports)

- **Academic Credentials for Persons** - Where did each person graduated from and with which degrees? Honors? When? How long did the person take to graduate?
- **Basic Person Demographics** - What is the name or preferred name, address, gender, phone, email, and contact information about a person? Address type selectable
- **Organization Basic Demographics** - What is the name or preferred name, address, gender, phone, email, and contact information about an organization? Address type selectable

FACULTY AND COURSES (7 reports)

- **Course Enrollment Charts** - How many active students are there in each term? How many dropped out in each term? Which are the most popular courses? Departments?
- **Faculty Course Assignment List** - What are the courses each faculty is teaching? How many students is the faculty teaching per course? What's the load for each course section?
- **Faculty Load Charts** - Which departments have the heaviest faculty load? Which have the lightest? What is the faculty load like for each academic level? For each Term?
- **Faculty Regular Assignment Summary** - For each course section: What is the load for each faculty? What is his/her status? How many advisees does he/she have? How much is he/she paid?
- **List of Courses by Department Division** - What courses are being offered? By department, division? How many active or waitlisted students? Over-enrolled?
- **Percent Courses Canceled** - How many and what percentage of the sections offered were cancelled?
- **Section Waitlist Charts** - Number of waitlisted students per term

FINANCIAL AID (10 reports)

- **Applicant FA Report** - Which Applicants for the upcoming term have been offered financial aid? Which academic programs have the highest average financial aid package for their applicants?
- **Award Distribution Charts** - For each academic year: What is the total amount awarded in each award category? Who are the students receiving the highest award amounts?
- **CommonLine Loan Analysis** - How have the loans awarded at the institution been distributed by type, lender, and academic year? How much money has been disbursed to student accounts? What loans have specific students received over their tenure at the institution?
- **CommonLine Loan Status** - What is the processing status for the CommonLine loans at the institution? Where are the institution's loans in the certification process?
- **Direct Loan Status Report** - Where are the institutions Direct loans in the origination process?
- **Enrolled Student SAP Status** - Are the institution's students who are receiving financial aid making satisfactory academic progress? Which academic programs have a larger share of students having difficulty in maintaining their eligibility for financial aid?
- **Financial Aid Summary** - How much aid was offered/given to a student in a given period? What were the awards and when?
- **ISIR Details** - What ISIR FAFSA information has been received for individual students? What transactions have been exchanged with COD for these students?

- **ISIR Trend Report** - How has the number of ISIRs received by the institution varied over recent years? How does the current year's workload compare to previous years?
- **ISIR Verification Report** - How many students have had ISIRs indicating that the student was selected for verification? How does this relate to previous years?

HUMAN RESOURCES (10 reports)

- **Active Employee Demographic Distribution Charts** - Number of active employees by age band, ethnicity, gender, department, and current employment status.
- **Active Employees Benefits Enrollment Report** - Which benefits is each employee enrolled in? Which benefits is each employee not enrolled in?
- **Basic Active Employee List Report** - How many employees are there in the institution? What is the status of each employee, primary position, primary position location, primary position department, name of employee, and email address? How long have they worked for the institution and when did they start?
- **Benefit Change Report Since a Certain Date** - How many employees have been added or dropped from each benefit program since a certain date? What is the total of currently active employees for each benefit program?
- **Earning Distribution Charts** - How much do active employees earn on average? Broken down by age, service year, primary departments, and current status.
- **Employee Current Benefit Costs and Pay Rates** - For each current employee: Which are the benefit programs the employee is contributing to? What is the contribution percentage for the employee and the employer? What are the salary limits? What are the costs and who is providing the benefit?
- **Employee Position & Job Skill Information Charts** - How many employees are hired for each type of position? How many are employed for each skill?
- **Leave Hours Taken Charts** - Over time, how many leave hours have employees taken? Broken down by age bands, gender, and tenure status.
- **Pay Period Earnings and Taxes** - Since a chosen date, what is the earning amount for each employee? What are the tax amounts the employee and the employer paid for each tax?
- **Remittance Summary and Chart for Active Employees** - What is the total remittance paid to each vendor? For every active employee, what was the remittance amount for each benefit? What was the tax withheld amount for the employee and the employer? How much of the remittance did the employer pay? Who was the benefit provider?

STUDENT – APPLICATIONS AND APPLICANTS (7 reports)

- **Admissions Representative Performance** - How many inquiries/applications has each admissions representative handled? Of the inquiries, how many became serious? Of the applications, how many resulted in matriculation?
- **Admissions Representative Summary** - Who are the admissions representatives and what are the recruitment territories for these prospects/applicants?
- **Alumni Area Representative Performance** - How many inquiries has each alumni area representative handled? Of those, how many turned into applications? What are the breakdown of the recruits by prospect status?
- **Applicant Demographic Distribution Charts** - How are the applicants distributed by ethnicity, citizenships, residency, and gender?
- **Applicant GPA and Tests** - What are the Test scores and GPA's from previously attended institutions for each applicant?
- **Application Distribution Charts by Term** - How are applications distributed by prospect status, admit status, sources, and influences for the chosen term(s)?
- **Application Distribution Since a Certain Date** - How are applications distributed by prospect status, admit status, sources, and influences for the chosen term(s)?

STUDENT – AR / CR (6 reports)

- **AR Invoices by Course Section Charts** - What are the total charges for each school, department, or individual course section?
- **Outstanding Balance for Past Student Terms** - For the selected terms, what is the outstanding balance for each student? What are the grand total outstanding balance for all students for each term?
- **Payment Plan and Invoice Totals Report & Charts** - For an account holder, what are the invoice total amounts for each term? What is the payment plan for each term?
- **Student Invoice and Payment Report** - For an account holder, what are the invoices and their amounts for each term? What are the payments for each term? The report now shows tax charges and allocated payments.
- **Student Total Charges by Term** - What are the total charges for students in each Term? **Whole Invoices by Term** - What are the total charges for students in each Term? Individual invoice items are not shown in this report.

STUDENT – ENROLLMENT (3 reports)

- **Average Course Grade by Term, Courses and Department** - What grades did students get for their courses on average? Sliced by term, courses, and departments.
- **Enrollment Charts** - What are the most popular courses? Programs? Which departments have the highest enrollment? What is the enrollment trend over the terms?
- **Total Credits for Students by Enrollment** - How many credit hours are registered by each student?

STUDENT – TEST SCORES (3 reports)

- **Average Test Scores by Test Type and Student Attributes** - What is the average noncourse Test score for each type of test? For each Gender? Each age band?
- **Students Test Score Details** - What tests has each person taken? When? What are the scores?
- **Top and Bottom Scorers by Test Type** - Who are the people scoring the highest scores and the lowest scores for each type of test?

Dashboards

Also within the Reporting and Operating Analytics product, there are several dashboards, each containing pertinent metrics that help monitor and analyze current events. The dashboards are persona-based and organized by Colleague subsystem.

STUDENT (4 dashboards and 41 total metrics)

- Director of Admissions
- Director of Residence Life
- Registrar
- VP of Enrollment Management

FINANCIAL AID (3 dashboards and 34 total metrics)

- Assistant FA Director
- FA Director
- FA Loan Specialist

HUMAN RESOURCES (3 dashboards and 33 total metrics)

- HR Benefits Dashboard
- HR Departmental Dashboard
- HR Director Dashboard

COLLEAGUE FINANCE (3 dashboards and 41 total metrics)

- Bursar
- Chief Financial Officer
- Controller