

Reference for the Tableau Visualization “Tuition Monitoring for Non-Pooled Operations”

About this visualization

This data visualization provides information needed by non-pooled tuition programs to monitor their revenue both within a term and over time. Programs are expected to use this visualization to check the accuracy of the assessed students and tuition rate before the start of the term.

NOTE: The amounts in this visualization reflect totals of non-pooled tuition through the end of each fiscal year. The data view *does not capture changes after that point in time*.

Data Source and Updates

This visualization uses data from the InfoAccess data warehouse view “Bursar_Assessed_Tuition”. The data refreshes Monday morning at 7:30 AM based on data through the previous Friday. Data for each term will be available the Monday after batch tuition calculation begins. The general schedule for the first batch calculation is below.

Term	First Batch Tuition Calculation
Fall	First weekend in August
Spring	First weekend in December
Summer	First weekend in April

Viz Navigation

The home page provides links to each viz. You may also use the tabs.

There are three useful arrows above the home tab when using filters:

1. Undo
2. Redo
3. Revert – This returns to the original display. If you have clicked multiple filters and want to go back to the original chart, use the revert arrow.

Usage Notes for Each Dashboard (Tab)

Tuition Snapshot – General Filtering

You may filter the Tuition Snapshot charts by using: (1) one fiscal year, (2) one or more departments, (3) the academic plan or subplan description or code, (3) the Residency by Tuition Assessment pie chart slices. For department, plan and subplan filters, you may include or exclude values. Clear these values with the funnel at the end of the filter title or use the undo or revert buttons in the upper left corner of Tableau Server. Note that when the program department has changed, you must include the old department to see the data for the years when it was active.

Tuition Snapshot – Assessed vs Total Paid Tuition, Assessed vs Waived Tuition, Assessed vs Unpaid Tuition, Assessed vs Net Assessed Tuition

This bullet chart compares assessed tuition (line) to another chosen amount (bar) by using the filter buttons to select the amount type. Options are the total paid tuition amount, the waived tuition amount, the unpaid tuition amount, or the net assessed tuition amount. Choose the assessed amount if you only want to show that amount.

Tuition Snapshot-Third Party Deferred vs Third Party Paid, Third Party Paid vs Total Paid, Third Party Unpaid vs Total Unpaid

This bullet chart shows three different charts based on third party data.

To understand the status of your program's third party collections, choose the chart Third Party Deferred (line) vs Third Party Paid (bar).

To understand how much of your program's tuition payments come from third parties, choose the chart Third Party Paid (bar) vs Total Paid (line).

To understand how much of your program's unpaid balance comes from a third party which may indicate that it is more likely to be collected, choose the chart Third Party Unpaid (bar) vs Total Unpaid (line).

Tuition Snapshot – Residency by Tuition Assessment

This chart displays residency percentages based on the assessed tuition amount.

To focus on a specific residency for one or more terms: Click one or more pie slices (such as fall Wisconsin resident and spring Wisconsin resident). This will filter the other charts by tuition residency. (Note: The fiscal year scroll will not work because you have selected one or more specific terms within a single fiscal year.)

To go to a student list for a specific term and residency: Hover over a selected pie slice and click the link "Filter Student List" in the tool tip. This will take you to the Student Assessed Tuition List chart.

To clear the selected pie slice(s): Click within the chart white space.

Notes: (1) Tuition residency does not reflect Minnesota if the student has not been granted Minnesota reciprocity by the Minnesota Office of Higher Education even if the student is from Minnesota.

(2) Programs that do not have a tuition rate based on residency will still show tuition residency based on the students' eligibility.

(3) For a few students, there may be a discrepancy in the residency that is displayed for a student. This is a known issue in the data that should be addressed by DoIT in the near future.

Tuition Snapshot – Number of Students

This chart provides a student count by term based on tuition assessments that do not equal \$0 (which results when a student drops all coursework at the 100% refund level or the student's academic criteria changed and tuition re-calculated under a different program.)

You may click on a term dot to go to the Student Assessed Tuition List chart for that term. Hovering over the dot will provide supplement information on the number of students with waivers and the number of students with unpaid balances.

All filters and the Residency by Tuition Assessment pie chart slices will filter this chart; however the Residency by Tuition Assessment does not filter the Student Assessed Tuition List chart.

Student Assessed Tuition List

Use this dashboard to review a program's list of students and their assessments for the term. A filter excludes any \$0 assessments. You may choose to include \$0 assessments or only show \$0 assessments. You may also choose to include multiple terms which may help in tracking cohorts or comparing tuition rate changes.

This dashboard include all terms initially unless you have chosen to filter from Tuition Snapshot – Number of Students. It also provides a student name search that will look for any portion of a name with the entered characters.

Multiple Fiscal Years with Term

This bullet chart is similar to Tuition Snapshot –Assessed vs Total Paid Tuition; however, it provides the ability to view multiple fiscal years at one time and to focus on a specific term across fiscal years by using the highlight feature or by selecting the term and choosing "Keep Only". The chart also provides the ability to drill up or down on the organization code (division to department to subdepartment)

It will use the filters from the Tuition Snapshot but does not provide the ability to update these filters on this chart except for department and tuition amount type. The Tableau server revert button will refresh the chart to your complete department ID access.

Plan Subplan Report

This dashboard has summarized tuition data per fiscal year by plan, subplan, and term. The color legend provides the range of values for that field within a term.

Item Type Report

This dashboard provides an item type listing with term and fiscal year totals. It has the department ID and account code if you want to compare the report total paid amount with WISDM/WISER. The color legend provides the range of values for that field within a term.

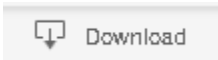
Student List for 173226 Only

This report is only for the School of Education department 173226. It provides all students with every report run date rather than the most recent date due to students beginning at various points in time.

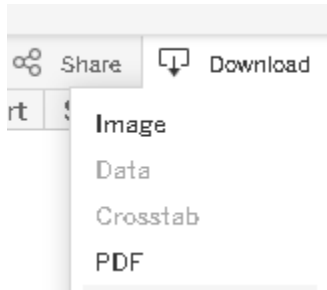
Printing Options: Image

The option will only show what is on the screen including filters. If you have a report that scrolls, it will not capture that full data.

1. Click the Download button which is located top right above the home navigation button.



2. Choose Image from the Dropdown list



3. Click download in the Download Image dialog box.



The image has been generated.

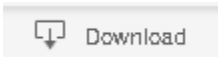


4. A dialog box to open or save a .png file will appear.

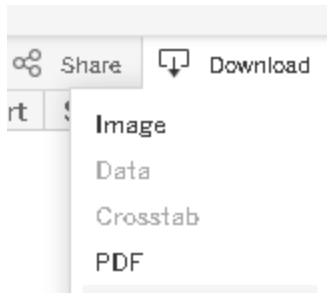
Printing Options: PDF

To download to PDF

1. Click the Download button which is located top right above the home navigation button.



2. Choose PDF from the Dropdown list



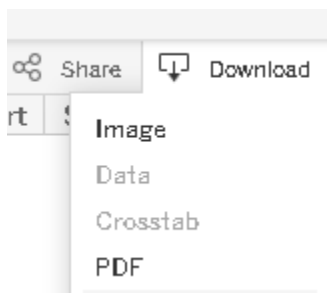
3. In the download PDF options box
 - a. Layout, Paper Size and Scaling is your choice. Scaling set to “At most 1 page wide” may be the best choice for a report that is longer than one page. Automatic scaling may try to shrink the report to one page.
 - b. Content
 - i. This Dashboard: This generates the same picture as the image print option except it will be PDF format. It will print the screen with all of the filters showing. Only choose this option if your data fits within the screen and you want to show the filters.
 - ii. Sheets in Dashboard: Choose this option for a single report.
 1. Then under “Sheets to download” un-highlight any sheet except the one for the report that you want to print. “Sheets to download” displays all of the navigation sheets (such as Home, Info, Next, Previous, etc.). The only highlighted sheet should be the report sheet.
 - iii. Sheets in Workbook: This will print every tab in the visualization as a screen print. Any report that is larger than one screen will not have the full report displayed.

Download Options: General Information

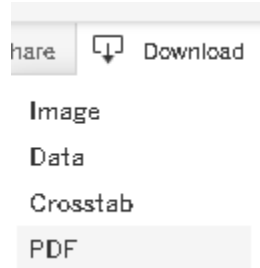
You may download summary data or download a crosstab.

Please note the following Tableau download issues:

1. If you see Data and Crosstab grayed out so you do not have access like this,



click inside of the chart to activate the data and crosstab options . (Sometimes you may need to click within the chart more than once.) You should see all options in dark print as below:



2. Since Tableau downloads text files, leading zeros will not be in the file.
3. Column headers may not be the same as the display name; instead they may be the actual field names that are in the data.

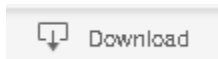
Download Options: Data

This option will download data in a text file format that can be used in Excel. The file will not keep leading zeros.

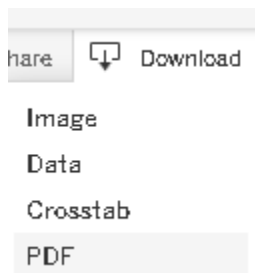
The “Swap Amount Type Measure” field will appear when you download data from a chart that has multiple options (e.g., assessed amount, total paid amount, waived amount, unpaid amount, etc.). The amount will be for the option type in the chart at the time of downloading.

To download data:

1. Click the Download button which is located top right above the home navigation button.



2. Select Data. A separate browser window will open and will display up to 200 rows of data with a link to download all rows as a text file.



3. Select the link download all rows as a text file
4. A text file dialog box will display to open or save the file.

Download Options: Crosstabs

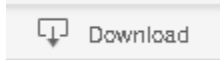
You may download any dashboard as a crosstab. The text format file does not keep leading zeros. It can be opened in Excel.

Three dashboards already display as crosstabs (Student Assessed Tuition List, Plan Subplan Report and Item Type Report). Downloading these as crosstabs will give you the same layout as the dashboards without the extra formatting.

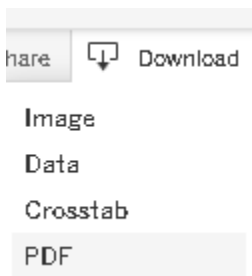
Tableau Usage Note: If you download a chart that has the ability to scroll fiscal years, it will list every field but will only include measure data for the year that is displayed in the chart. Any other year will be blank. A data download rather than a crosstab may be a better option.

To download a crosstab

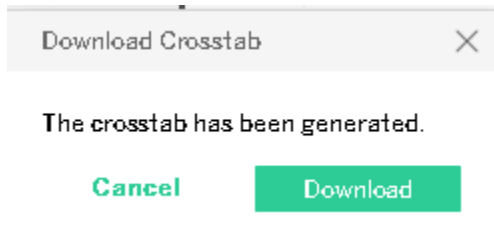
1. Click the Download button which is located top right above the home navigation button.



2. Choose Crosstab from the Dropdown list



3. Click download in the Download Crosstab dialog box.



4. A text file dialog box will display to open or save the file.

Definitions of Terms Used

Term	Functional Definition
Account Code	A code assigned to classify each transaction on the general ledger (e.g., asset, liability, revenue, expense).
Assessed Amount (Tuition and Fees)	The total amount of tuition and fees charged to a student.
Campus ID	This is simply a unique student identifier (10 digits). It may occasionally change at the student's request. It is not the same as ID in the

	Student Information System (SIS) or ID in the Human Resources System (HRS).
Class (Building) (Accounting)	A code assigned to specify which campus building if needed (e.g. maintenance).
Department ID (Accounting)	A 6 digit code to represent an organizational unit.
Fiscal Year	A period that an organization uses for accounting purposes and preparing financial statements. For the university, the fiscal year is from July 1 - June 30 (i.e., FY2016 = July 1, 2015 to June 30, 2016). Summer is the first term in the university fiscal year.
Fund (Accounting)	A code assigned to resources whose use is limited by donors, granting agencies, law, outside entities, or governing boards. A fund code is maintained for each specific purpose.
Funding String	A comprehensive account structure that supports GAAP and GASB financial reporting, internal financial reporting, and account reconciliation. UW Madison's funding string includes: Fund, Program, Department ID, Project, Class (Building), and Account Code
ID (SIS)	SIS personal Identifier. It is also called a student empl ID. The ID will never be changed throughout the individual's relationship with the University. This is not the same as Campus ID. This is not the same as HR ID or the ID field from HRS or the Empl ID from HRS.
Item Type	A 12-digit number assigned in the Student Information System (SIS) Student Financials to identify a funding string for a specific type of accounting transaction. This is also called the item type number.
Item Type Description	An explanation up to 30 characters assigned in the Student Information System (SIS) Student Financials to identify what an item type number represents.
Net Assessed Tuition	The assessed tuition amount minus any waived amount. This is the amount of tuition that the university expects to collect.
Non-pooled Tuition	Tuition that directly supports an organizational unit instead of being combined with other revenues for general support of the institution.
Program (Accounting)	A code assigned to classify institutional activities in accordance with NACUBO.

Project (Accounting)	A code assigned to further specify limitations/classifications on use of funds if needed (e.g., grants).
Term ID	Student Information System (SIS) numeric representation for the academic term. The term ID is derived as follows: Character 1 = Century (0 = 1900 and 1 = 2000) Character 2 & 3 = Academic Year Character 4 = Term (2=Fall, 4=Spring and 6=Summer)
Third Party Deferred Amount	The amount of tuition and fees that is charged or deferred to an organization (internal or external) who is responsible for part or all of a student's tuition and fee assessment. This is also called a third party deferral.
Third Party Paid Amount	The amount of money collected from an organization that is responsible for part or all of a student's tuition and fee assessment. This does not include amounts that are set up in the Student Information System Student Financials as scholarships.
Total Paid Amount	The amount of money collected. It does not include amounts on a student account that are deferred or charged to a third party.
Tuition Residency	"Tuition Residency" indicates the residency status of a student for tuition purposes. Some non-resident students from Minnesota ("Minnesota Compact" students) pay tuition based on a legal agreement between the states of Wisconsin and Minnesota.
Unpaid Amount (Tuition and Fees)	The amount of tuition and fees that needs to be received. It is calculated as the assessed amount minus the total paid amount minus the waived amount.
Waived Amount (Tuition and Fees)	The value of a waiver or remission that has been applied to a student account.
Waiver (Tuition and fees)	The amount of assessed tuition and fees that will not be owed by a student or a third party on behalf of the student per State of Wisconsin statutes or University of Wisconsin System policy.