Data Exploration Series:
Focus on the Activity Informed Budgeting Dashboard II
Introduction
History of AIB Dashboard
AIB Model
Dashboard Tour
AIB Subject Areas
Q&A
WHO WE ARE AND WHAT WE DO

UAIR is committed to providing data that empowers campus decision makers, informs policy and practice, and tells the Arizona story.

Our Services

▪ Enterprise Data Warehouse
▪ UAccess Analytics & Reporting
▪ External Reporting & Rankings
▪ Interactive Fact Book
▪ Customer Experience & Support
▪ Data Science
▪ System Management
UAIR Data Path

Follow the data lifecycle and how our teams deliver it to you

**Source Systems**
- UAccess | Employee
- UAccess | Financials
- UAccess | Research
- UAccess | Student
- Additional Sources

**Data Intake**
ETL/ELT Process
1. Extract
2. Transform
3. Aggregate
4. Load
5. Validate

IBM IBM Datasstage

**Enterprise Data Warehouse**
Subject Areas/Data Models
- Data
- Data
- Data

Oracle 19c

**UAIR Services**
- Analytics & Reporting
- Data Science
- External Reporting
- Training & Data Literacy

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**Data Governance, Management, and Security**

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**UAIR Teams**
- Administrative Data
- Customer Experience & Support
- Data Engineering
- Institutional Reporting
- Student Data
- Systems Architecture & Security

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Associate Vice President & Chief Data Officer

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WHO’S HERE

68 Registered attendees

68% Have never attended a DES

74% Responded as somewhat or very comfortable with UAccess Analytics
WHAT DO YOU WANT TO KNOW?

- How do I use/read the AIB reports?
- A better understanding of the AIB process.
- What updates have been made to the AIB dashboard?
- What data is most useful to college departments?
- How do I make customized AIB reports?
- I want to understand Graduate NTR.
AIB MODEL
AIB MODEL

AIB Visual Aid

Undergraduate Sources
Net Tuition Revenue (NTR) generated from all Undergraduate delivery platforms.

Graduate Sources
Net Tuition Revenue (NTR) generated from all Graduate delivery platforms.

Facilities & Administrative (F&A)
Reimbursement for sponsored project indirect costs as defined by the Office of Management and Budget Uniform Guidance 2 CFR, Part 200.38.

Other Unrestricted Sources
Revenues included within AIB that do not fall within any of the other specified classifications.

Local Sources
Revenues that are generated, flow to, and are generally managed by individual departments, colleges, and divisions.

Revenue Sharing

Activity Informed Allocations
Budget allocations assigned within AIB based on a revenue or cost metric. Common activity metrics include Student Credit Hours, Degrees Awarded, and Major Enrollment Headcount.

Strategic Budget Allocations
Ongoing budget allocations assigned within AIB based on the strategies and goals of university initiatives.

Executive Allocation Decision

Innovation: Competitive Bid, Project Based, ROI
Investment / Innovation Funding
Fixed-term budget allocations assigned within AIB based on the goals and objectives of specific projects.

College / Division Operating Budgets

Metric / Formula Allocation

Executive Allocation Decision

Proposal Decision

*See Definitions Guide for a more detailed explanation of each component.
AIB MODEL RESOURCES

- Definitive webpage for the AIB model

- https://www.aib.arizona.edu/model-resources

- Includes:
  - Link to the Functional Model
  - Training content
  - Key definitions and terms
  - Conceptual and prototype information
  - Feedback and contact details
  - Much more
AIB SNAPSHOT DATES

- Can be found in the AIB Dashboard
- Fiscal Year 2024 AIB Snapshot Dates:
  - Summer Term End: August 21st, 2023
  - Fall Census Date: September 11th, 2023
  - Fall Term End: December 15th, 2023
  - Winter Term End: January 10th, 2024
  - Spring Census Date: January 31st, 2024
  - Spring Term End: May 10th, 2024 for metrics and June 1st, 2024 for Degrees and Revenue
ANAPLAN
FUNCTIONAL MODEL

- Functional model can be found on the AIB website.
- Backtrace and validate the data found in the AIB Dashboard.
- Use the dashboard to gain additional context about the data.
- Black text signifies actual amounts, blue is projections.
FUNCTIONAL MODEL
AIB DASHBOARD RECAP
HISTORY

- AIB implemented July 2022.
- AIB dashboard released November 2022.
- Dashboard updated September 2023.
- Dashboard was originally locked, no ability to Analyze or create custom reports.
NAVIGATING TO THE DASHBOARD

- Click on the Dashboard menu.
- Under “Activity Informed Budgeting” NOT “Budget”.
- Provisioning required: Activity Informed Budgeting (AIB)—Medium*
DASHBOARD TOUR
Activity Informed Budgeting (AIB) | Overview

The AIB Analytics dashboards intend to display the student and financial components and facts (metrics) as represented in the AIB Model. The dashboards provide data and visualizations on an institutional, college, departmental, and detail level.

Dashboard Page and Sub-Page Descriptions

- Student Credit Hours

AIB Student Credit Hour (SCH) - These dashboard pages provide measures of the number of credit hours taken at the institutional, college, and departmental levels. SCH is allocated to departments and associated colleges as a course owner methodology. The pages present SCH by Campus and Career. The pages allow you to drill-down into the list of classes, students, and associated instructors. These data are available from AIB fiscal year 2020 forward. The AIB fiscal year is defined as starting in Summer and going through the following Spring.

Below are the business rules of exclusions for the dataset:
- Undergraduate student SCH are included whether the student has paid or not.
- Graduate student SCH is distributed only for students that have paid.
- SCH includes Global Campus and Study Abroad classes.

Data on this dashboard includes Undergraduate and Graduate (Graduate, Law and Pharmacy) only.

- Institutional Level | Student Credit Hours Summary
- College Level | Student Credit Hours Summary
- Department Level | Student Credit Hours Summary
- Student Credit Hours | Details

AIB Undergraduate Degrees
- AIB Enrollment
- Net Tuition Revenue
- F&A Distribution

We Want to Hear From You

AIB Questions?
Office of Budget and Planning
Phone: 520-621-3634
Email: aib@arizona.edu

University Analytics and Institutional Research (UAIR) Dashboards Questions?
Website: https://sas.arizona.edu/
Phone: (520) 621-3630
Community Forum: UAccess Community - Analytics
Feedback: Request Form

Useful Links

- Links
- Activity Informed Budgeting (AIB)
- AIB Frequently Asked Questions
- AIB Quick Reference Guide
- AIB Model Resources
- Office of Budget and Planning

- Summary of each page and links to subpages
- Relevant business rules of exclusions
- Contact information for OBP and UAIR
- Links to useful AIB resources
All pages except for Graduate NTR follow the same structure:
- Institutional Summary
- College summary
- Department Summary
- Details
All summary pages contain:

- Fiscal Year Highlights
- Trends
- Breakdowns
Details pages offer the most customization and granularity.
FILTER CHOICES

- Use “Term End” to view the most up to date data for the selected snapshot.
- Use “Census” for planning and benchmarking.
AIB SUBJECT AREAS
FOUR(!) NEW SUBJECT AREAS

- AIB – Activity Informed Budgeting – Degrees
- AIB – Activity Informed Budgeting – Enrollment
- AIB – Activity Informed Budgeting – Graduate Net Tuition Revenue (NTR)
- AIB – Activity Informed Budgeting – Student Credit Hours (SCH)
WHY BUILD FOUR SUBJECT AREAS?

- Original setup wasn’t flexible enough.
- Granularity/level of detail between different sections wasn’t compatible.
- Each subject area allows users to focus on relevant data.
WHY BUILD FOUR SUBJECT AREAS?

Creating an Analysis in the AIB – Activity Informed Budgeting – Student Credit Hours subject area.
QUESTIONS?
TRAINING & DATA LITERACY

- Interactive trainings in EDGE Learning
- YouTube playlists
- Data Exploration Series highlighting important services
- One-on-one office hours
- External newsletter
THANK YOU