

Top 5 Status Update

Anja Canfield-Budde, Senior Manager, OIM
Todd Mildon, Registrar

What is “Top 5”?

Top 5 Questions

What is my Student headcount?

What are my Student credit hours?

What is my Faculty headcount by appointment type?

What is my Faculty FTE by appointment type?

What is my operating budget by GOF, DOF, and RCR?

Top 5 - Program Support

- Central Administrative Offices
 - Student Academic Data Management (Todd Mildon)
 - Financial Decision Support Center(Charles Bennett)
 - Academic HR (Rhonda Forman)
- Office of Information Management
 - Decision Support Services (Enterprise Data Warehouse, Business Intelligence Tools)
 - Special Projects and Portfolio (Technical Writing and Administrative Support)
- Data Management Committee www.washington.edu/provost/oim/dmc/
 - Policies & Procedures
 - Access and Roles Task Force
 - Organizational Coding Task Force

[President](#) | [Provost](#) | [Executive Vice President](#) | [Vice Presidents](#) | [External Affairs](#)*Office of the Provost*

Office of Information Management

OIM Home

Data Management Committee (DMC)

Projects:

Top-5 Dean's Questions

[About the Project](#)[Institutional Definitions](#)

Reports:

[Unit Resource Profiles](#)[Student](#)[Faculty](#)[Finance](#)

Top 5 Project: Overview

In December 2006 Provost Wise wrote a Charge Letter that created the Data Management Committee to address the need for a consistent "... approach, designation, and governance of data, metadata, and the information base of business processes." The Data Management Committee created the Top 5 project and the Deans' Advisory Group. The initial project members drafted a list of potential questions and presented to the Deans' Advisory Group. The Deans' Advisory Group picked their "Top 5" questions.

Over the next year three task teams - Student, Faculty, and Finance - delved into the complexities surrounding each question. As a result of their investigations, they identified issues that needed to be addressed, decisions that needed to be made, reports that needed to be created, and terminology that needed to be defined for the Institution. You can view the results of this effort by clicking the links below.

Student Area

The Top 5 Student questions are:

- [What is my student headcount by major?](#)
- [What are my student credit hours?](#)

Institutional Definitions

Reports (beta)

Issues, Recommendations, and Decisions

Faculty Area

The Top 5 Faculty questions are:

- [What is my Faculty headcount by appointment type?](#)
- [What is my Faculty FTE by appointment type?](#)

Institutional Definitions

Status / Future Plans

Top 5 Questions - Finance

Charles Bennett Lead – Task team meeting every two weeks focusing on defining new short term reports

Questions of Focus

- How much money do I have?

Issues in Progress

- Fiscal year accounting and reporting, Cross Unit Accounting, Complex Organizational Coding Structure (*)

Reports in development

- Budget summary by organization
- 16 new reports identified

Definitions in development

- 18 new definitions under way

(*) New DMC Task Force formed to address Organizational Coding issues

Top 5 Questions - Faculty

Rhonda Forman Lead – Concentrating on data definition projects around Academic HR data and loading data into the EDW

Questions of Focus

- What is my Faculty Headcount and FTE by Appointment Type?

Issues in Progress

- Academic HR internal data quality, Complex Organizational Coding Structure (*)

Reports in development

- 3 Faculty list reports (Core Professorial, Core Instructional, Academic Administrators) by appointment types and pay rates

Definitions in development

- All core Academic HR definitions going into the EDW
 - Definitions will support producing reports for showing Appointment Histories, Degrees, and Endowment Information for faculty
 - Anticipate June 09 release for reports

(*) New DMC Task Force formed to address Organizational Coding issues

Top 5 Questions - Student

Todd Mildon Lead – Task team meeting every two weeks focusing on new reports and definitions

Questions of Focus

- How many student majors? How many student credit hours?

Issues in Progress

- Counting Tacoma / Bothell Students, Terminology for State Reported versus Non-State Reported Students

Reports in development

- Student Majors by ethnicity, gender, residency, etc.
 - What are the most critical dimensions?
- Admissions, Graduation
 - Are these the next top priority topics

Definitions in development

- New and updated definitions under way in support of new reports listed above

Questions?

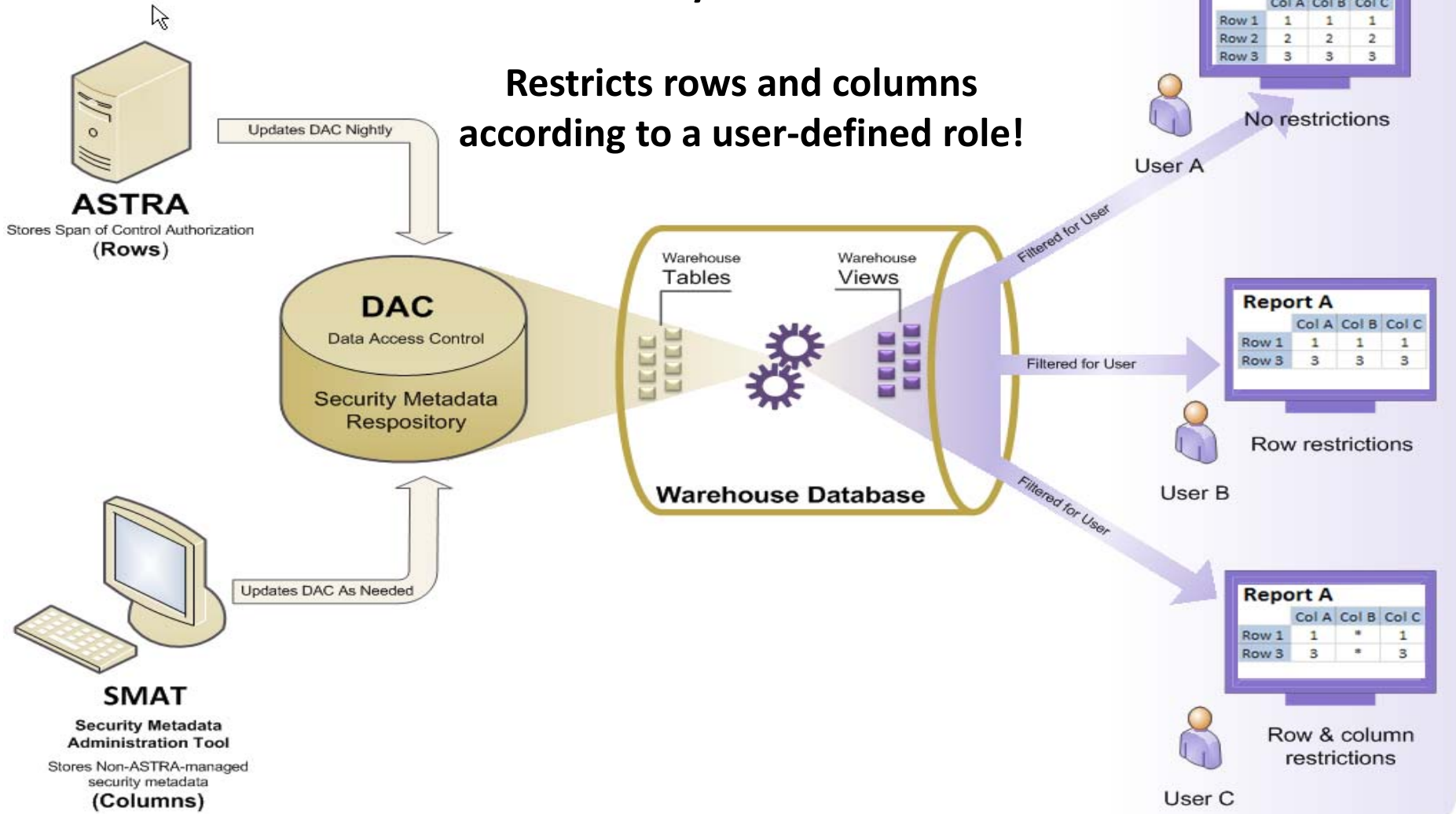
- Todd Mildon – tmildon@u.washington.edu
- Charles Bennett – charlesb@u.washington.edu
- Rhonda Forman – rdlahey@u.washington.edu
- Data Management Committee – dmc-support@u.washington.edu

Appendix

Report Security System

New fine-grained Data Access Control system created!

Restricts rows and columns according to a user-defined role!



Top 5 Reports

- Executive summary
- Drilldown capability
- Uniform, in-depth report detail

Human Resources

Academic Personnel Appointments with Appt FTE, Paid FTE and Full Time Rate

Executive Summary
The report provides a snapshot of all active faculty appointments from 10/15 in the selected job class group in the selected organization unit, or the selected campus code.

Official Name	College	Department	JCT	Title	Appt FTE %	Paid FTE %	Monthly Rate
BERNARD, ALEX THOMAS	COLL ARCH & BNSAK	ARCHITECTURE	0018	ASSOCIATE CHAIR	1.00		\$0.00
PILLER, DAVID B	COLL ARCH & BNSAK	ARCHITECTURE	0017	CHAIR	1.00		\$0.00
SCHWITZBERGER, JIMIE L	COLL ARCH & BNSAK	CONSTRUCTION MANAGEMENT	0017	CHAIR	100.00		\$0.00
DEWIS, KATHA	COLL ARCH & BNSAK	DEAN ARCHITECTURE	0012	ASSOCIATE DEAN	50.00		\$7,187.00
FREEMAN, GABRIEL S	COLL ARCH & BNSAK	DEAN ARCHITECTURE	0017	DEAN	100.00		\$18,942.00
CONNELL, JEFFREY K	COLL ARCH & BNSAK	DEAN ARCHITECTURE	0012	ASSOCIATE DEAN	50.00		\$10,877.00
ZIEBERGHALER, DONALD	COLL ARCH & BNSAK	DEAN ARCHITECTURE	0012	ASSOCIATE DEAN	100.00		\$0,838.00
WALKER, FREDERICK W	COLL ARCH & BNSAK	LANDSCAPE ARCHITECTURE	0014	ACTING CHAIR	50.00		\$11,482.00
BLANCHET, MICHAEL	COLL ARCH & BNSAK	URBAN DESIGN PLANNING	0017	CHAIR	100.00		\$0.00
WELLS, RANDY PEAK	COLL ARCH & BNSAK	URBAN DESIGN PLANNING	0014	ACTING CHAIR	50.00		\$7,478.00

Report Information
Report Name: Academic Personnel Appointments
Organization: Organization Code 200 (University of Washington)
Data Source: Academic Personnel System - Finance Appointments - Acad/Personnel - Job/Class/Dept
Created On: 11/10/2007
Report Control: Academic Personnel Appointments
Data Controller: Academic Personnel Information Services
Author: David Smith

Financial

Top 5 Financial Summary - Budget Community Rollup

Executive Summary
The financial report provides ending balances for any month and related year-to-date transactions such as revenues, transfers, expenses, and encumbrances. They are summarized by budget type - such as GDF, Local Funds, RCE, DRs, and so forth - and by major organization and/or department. You can drill down to individual lists of budgets, which can then be printed or downloaded as an Excel Spreadsheet.

UFG Code	Dept	Community Code	Budget Community Description	Beginning Balance	FY-to-Date Budget Amount	Temporary Budget Amount	Transfers In	Revenue	Total Available Funds	Transfers Out	Expenditures	Ending Balance	Encumbrance %
200	BDE		DESIGNATED OPERATING FUND	\$0	\$118,561	\$0	\$0	\$0	\$118,561	\$0	(\$2,673)	\$120,998	\$0
200	BDE		GENERAL OPERATING FUND	\$0	\$24,042,692	\$0	\$0	\$0	\$24,042,692	\$0	(\$1,917,285)	\$22,525,417	(\$151,804)
200	BSC		OTHER OPERATING FUND	\$52,654,256	\$0	\$0	\$0	\$1,271,715	\$53,925,971	\$0	(\$8,287)	\$53,947,683	\$0
200	BDE		RESTRICTED OPERATING FUND	\$5,232,851	\$0	\$0	\$0	\$1,942,215	\$7,175,066	\$0	(\$1,366,138)	\$5,788,424	(\$1,542,896)
TOTAL:				\$58,917,667	\$24,262,183	\$0	\$0	\$3,214,925	\$86,533,896	\$0	(\$2,941,600)	\$86,392,319	(\$1,704,791)

Report Information
Report Name: Top 5 Financial
Report Parameters: Fiscal Year 2008 (Ac August 01) End 200
Data Source: WASHINGTON UNIVERSITY - ODS - web (ACADEMIC PERSONNEL)
Created On: 11/10/2007
Report Control: Academic Personnel Appointments
Data Controller: Academic Personnel Information Services
Author: David Smith
Report URL: http://ok. admin. washington. edu/Reports/Pages/Report.aspx?ReportID=22&ReportID=22&ReportID=22&ReportID=22&ReportID=22

Academic

