Notes from EASY RIDER - Using GFS/Reportmart1 for Quick Help

Overview: After a quick discussion of two relatively unsung reports and encouraging folks to 'get to know them better' (Part I), we focused on some very quick ways to adapt a basic GFS report to many different looks/needs (Part II). We know you all do your jobs in different ways, and want/need to see information in different ways. RM1-GFS can do more things differently than you might have thought! We hope that if you see us do some 'edits' - if you know what can happen, and how easily - you'll find lots of ways to put it to work, and you can ask for help while you learn.

Part I.
Two favorite but not well known reports?

GFS Enrollment Check (GFS010)
- shows who has GFS but no units, or less than 8 units, or no TGR course
- good to run before certain key dates in the academic calendar (before the add deadline, for example, to save students extra fees for filing late)

GFS Student Gross Pay report (GFS024)
- shows payroll info for all pay issued to an active student
- hourly as well as GFS, one-time/retroactive, paper check vs. deposit, etc.
- shows you all student pay for any active student: no department-level security

Part II.
Making the GFS Aid Sum by Student (GFS008) fit your needs!

Demonstrations summarized below:

A. Processing a report
   1. By Pay Org
   2. By Acad Org

B. Saving a report to your desktop, and then re-using it

C. Quick and easy customizing of the basic GFS report (the pivot).
   1. Duplicate a pivot-section and rename it
   2. Remove columns you don't need or don't have room for
   3. Resize columns
   4. Delete totals/subtotals you don't need
   5. Sort and subtotal differently
   6. Add a field
   7. Add totals/subtotals at whatever level you want them
   8 - 10. Focus and Hide in a pivot-section
      to quickly change the report from "all data" to "just this type of data"

As we started into this, the basic demo/topic, both groups asked the same question:

Q. What is the difference between GFS Aid Sum by Student (GFS008) and GFS Aid Sum for All Students (GFS009) And can we do the same 'tricks' with both reports?

Most core GFS reports are built to show GFS data - and to collect some additional information about the students/post-docs receiving GFS aid. They are designed to allow meaningful subtotals/grand totals, and allow you to "slice and dice" that data/money in lots of ways, for whatever 'population' you are interested in.

But that means if a student doesn't have any GFS data, the student will not appear on most GFS reports. *For example,*
Run **GFS Aid Sum by Student (GFS008)** for your PhD students, quarter = 1092.
If Sue Smith doesn't have a fellowship/assistantship entered for that time period, she simply won't show up on the report, even if she's active in your PhD program.

The **GFS Aid Sum for All Students (GFS009)** is built in a different way. It says 'find me ALL my students and show me significant pieces of academic information about them, PLUS show me their GFS aid if any'. *So, continuing the example,*
Sue Smith will show up on **GFS009 -** with blanks in the GFS fields. You'll see that she's in your PhD program, but doesn't have a fellowship/assistantship entered (yet).

In order to get this type of academic info (acad plans, advisors, etc.) there's a tradeoff: students appear in the GFS Aid Sum for All Students report multiple times if they have multiple active academic plans - and their aid will appear multiple times too. You can see the 'multiples' on the report:
For example, if Julie Chen is active in both MS and PhD now, Julie's fellowship will appear in full next to her MS, and will repeat directly below for her PhD. You can easily see that it's the same information, so the report isn't fooling you into thinking she has two fellowships … it's just repeating the info.
<u>But this means that subtotals/grand totals don't make much sense</u> (Julie's aid will be counted twice), and it also means you can't 'slice and dice' the dollar amounts, or PTA info, etc. without wondering whether or not you're double-counting some money.

Simply put: GFS Aid Sum for ALL Students (GFS009) is a great report for academic status + financial detail. All the neat tricks about how to deal with a pivot table - how to delete or resize columns, delete totals, focus or hide data, etc. - will work.
But you don't want to use it for totals/subtotals, and you want to be very careful not to delete the "Acad Plan" column - because if you do, the students with two Acad Plans will now simply show double the amount of GFS aid. If they had three active plans, their aid would be tripled. (The job aid for this report includes this: when it explains how to add or delete columns, it warns why you would NOT delete the Acad Plan.)

Therefore: *During the presentation, we used the GFS Aid Sum by Student (GFS008) report for examples of how to slice/dice/re-sort/re-total your basic GFS info - how to, for instance, have the same report show you both the student-by-student aid details/totals AND the PTA-by-PTA totals of spending for these students.*

We could equally well have used GFS Aid Sum by Money Srce (GFS007), as it is really the same data and report/pivot structure, but with a different 'default' for sorts and subtotals. All the same tricks work in both reports.

Demonstrations

Quick ways to different 'views' or slices of your GFS data: run one of the basic reports for your basic population - then remove columns, re-size, focus/hide, re-sort, re-total.

A. Processing a report:

(1). **Process by Pay Org:**
You can select "whose money" to report on using the first filter – the window which shows org values and hierarchy – and scrolling down to highlight what you want:

Department Hierarchy:	
….	
1999862670	(3) RGNA – Departments
1999862952	(4) RBSA – Bioengineering
1999862975	(5) RJLJ – Administration
1999862986	(6) RJLT - Bioengineering Operations
1999862992	(6) RJMD - Student Services
1999862998	(5) RJMR - Labs and Programs

- OR – if you know the 4-alpha code you want (RBSA), you can click IGNORE at this prompt, and fill in the code in the next window.

Deptid Hierarchy

- Click the **custom values** button to clear the box of values
- Type in the code you want: **RBSA** (click the green arrow to add this value)

Note: You must capitalize the pay org code- **RBSA** will return all the GFS aid that comes from Bioengineering tasks but **rbsa** will return zero results

- Click the **OK** button

(2). **Process by Acad Dept/School (Acad Org)**
To select "whose students," you would use the hierarchy list and scroll down to highlight what you want - there's no option to "Ignore" this (shorter) list

Acad Org Hierarchy:	
0226666661	(3) ENGINEER - School of Engineering
….	
0233333327	(4) BIOENGR – Bioengineering
0239999994	(4) AEROASTRO - Aeronautics and Astronautics

Choosing BIOENGR is the same as **Process by Acad Plan** and choosing all the graduate plans that Bioengineering owns. It will include Postdocs, unless you select "Majors" to limit to matriculated graduate students (equivalent to BIOE-MS, BIOE-PhD). *Biongineering isn't such a great example of why you'd use an Acad Org … but if you have many academic-plans within your department or program, this can be very nice!*

B. Saving a report to your desktop, and then re-using it later so the same changes/additions can be used for updated data or so you can re-analyze the same data

(1). To save a report:

- first, go to **File -> Save options** and click on **Save Query Results with Document**
- a list of all the queries will appear, make sure that the boxes in front of them are checked (once you click the query boxes, results with empty boxes will appear—check those, too). This step will ensure that your data is saved in the report.
- then go back up and select **File -> Save As.** Save the report somewhere you can find it, and name it something that makes sense to you.

(2.) To reprocess a report:

- first log in to the Reportmart1 website
- then open any report so that the introduction page is showing but DO NOT RUN that report
- find your saved report file, and drag it onto the open introduction page window
- you should now see your saved report, along with any new sections you created and/or changes you made. If you went through the "save query results with document" steps described above, you should see the data from the last time you saved the report. To bring in new data, simply process the report again.

C. Quick and easy customizing of the basic GFS report (the pivot). For most of these changes described below you must first take the pivot section out of Print Preview by going up to the **File** Menu and clicking on **Print Preview** so that the checkmark is gone.

(1) Duplicate a pivot-section and rename it so you can compare the original with your changes:

- click on the name of the section you would like to duplicate in the grey area on the upper left side, in this case "GFS Aid by Student"
- right click on that name and select **Duplicate Section** from the choices that appear
- you will now be on a new section called by default "GFS Aid by Student2"
- right click on this new section name and select **Rename Section** from the choices that appear
- re-name it to something that makes sense to you

(2) Remove columns you don't need or don't have room for:

- click on the thin grey line above the column you'd like to delete (this line is at the top of the main report window, above even the column heading) so that the whole column is highlighted
- click the DELETE key
- or, find the column name in the rectangle labeled **Row Labels** at the bottom, and click on the DELETE key

(3) <u>Resize columns:</u>
- at the top of the main report window is a thin grey line that shows you the width of each column with tiny column separators that look like this: I
- click on those separators and drag them either right or left to make the columns larger or smaller

(4) <u>Delete totals/subtotals you don't need:</u>
- click on one line that's an example of the subtotal you'd like to remove. As a result, all the examples of that subtotal should be highlighted
- click the DELETE key

(5) <u>Sort and subtotal differently</u>:
- pivots sort by the left-most field - so to re-sort and re-subtotal, you move the columns from right-to-left or left-to-right by drag-and-drop in **Row Labels**
- *for example,* to have a report in PTA order instead of student-order:
- in the rectangle at the bottom labeled **Row Labels**, drag-and-drop the names of the columns so that **Project**, **Task** and **Award** immediately follow **Aid Status**

Note: if you Duplicate a pivot-section before re-sorting it, you will have two reports showing different views/totals of the same data – without re-processing. In this example, one pivot will be in student order, the other in PTA order.

(6) <u>Add a field:</u>
- any of the fields in the list on the lower left (called **Aid Results** in this case) can be added to the report
- to add the Project Description of the PTA, for example, scroll down the **Aid Results** list until you see **ProjectDescr**, click on it and drag it over to the **Row Labels** box. You can re-position it to the left or right as in (5)

(7) <u>Add totals/subtotals</u> at whatever level you want them:
- click on the thin grey line above the column you'd like to total (this line is at the top of the main report window, above even the column heading) so that the whole column is highlighted
- right click and select **Add Totals** from the menu that appears
- note: usually you will need to select the column to the right of the one you want to total

(8) <u>Focus and hide in a report:</u>

- to quickly change the report from "All data" to "just this type of data"
- for example, to show just TAL, click on any cell that says "TAL" in the main report, right click and choose **Focus on Items** from the menu that appears
- or, to show everything that is not TAL – choose **Hide Items**
- you can Focus and/or Hide on many fields, or many values, in the same pivot
- setting a Focus/Hide in one pivot-section does not change any other pivot. *(You can create several pivot-sections to focus on different parts of your data)*

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(9) <u>See that a focus/hide is in place</u>, meaning that not all your data is showing:

- in the box labeled **Row Labels** at the bottom of the report, any field that has a little drill symbol in front of it means that a focus or a hide is in place
- once you remove the focus or hide from that column, the drill symbol disappears

(10) <u>Remove a focus/hide</u> to flip back to showing all the aid (or to focus on something else):

- either click on the column which has the focus or hide on it, or click on the column name with a drill symbol in front of it in the **Row Labels** box
- right click and choose **Show Hidden Items**
- if you choose **Show All Hidden Items**, it will undo all the focus and hides in the report at once.

More information about working with pivots and doing shortcuts and tricks such as these are available in job aids located on the Reportmart1 website. Two in particular, the job aid for the GFS Aid Sum for ALL Students report (pp. 18-19) and the job aid for the Student Demographics reports (pp. 25-28), have detailed instructions for working on pivots. (All job aids are located in job aid subfolders immediately under the main GFS and Student Administration folders.) In addition, we have written a detailed job aid on Focusing and Hiding Data in a Pivot that is available on the GFS Users' Forum website.