

Current and Historical Financial Aid Report Infographic Document

Current and Historical Financial Aid Report Overview

This is meant to provide a simple overview of each page of the Registration Report. Each section offers:

- *A simple overview of the goals of each page*
- *A list of interactable slicers, filters, and interactable points*
- *A reference to the manual for more information (if applicable)*

For more information and questions, please reach out to the InformSU team at informsu@seattleu.edu.

Power BI General Tools and Tips Key

- **Reset:** Clear all the selections you have made in the report and go back to a clean slate
- **Bookmark:** Create a version of a page you can go back to anytime (Use a descriptive name!)
- **Full Screen:** Expand the view of the report to full screen for better visibility (found in the menu)
- **Eraser:** Clear your selections from a slicer (found in upper right-hand corner of slicer)
- **Pages:** The report page names displayed on the left of the report can be removed and accessed later

Power BI Slicer Key

- **Pull Down:** Brings down a list of options on click
- **Slider:** Adjust scanned values from both ends
- **Rollover:** Hover mouse over for more information
- **Button:** Click to activate / deactivate filter
- **Jump:** Click to follow to new page
- **Toggle:** Click to adjust filter
- **Interactable:** Click for action

Page: Student Summary and Selection

This is the main selection page where users can start to define the student and award filters they'd like to apply. This page does not include date selections as it displays the currently active awarded and transmitted aid values for the specified population.

Slicers

- **Pulldown:** Academic Year | Term Type | Term Group
 - Enrolled Student Snapshot Slicer Panel

- Academic Level, Class | Admit Status | Enrollment Status | Age Ranges | Diverse Flag | URM Flag | Gender | International Flag
- Budget Group Slicer Panel
 - Budget Group | Budget Group Enrollment Status | Budget Group Admit Status | Budget Group Term
- Award Slicer Panel
 - Award Code | Award Description | Funded & Unfunded Flag | Aid Type | Fund, Activity, Object

Data Visualizations

- Spreadsheet: Student Summary and Selection Spreadsheet
 - Budget Group | Student Count with Active Awards | Active Awarded Aid | Active Transmitted Aid

[Page: Active Awards](#)

This is a secondary page to look at active award data and has a comparison for active awarded vs transmitted aid.

Slicers

- Pulldown: Academic Year | Term Type | Term Group
 - Enrolled Student Snapshot Slicer Panel
 - Academic Level, Class | Admit Status | Enrollment Status | Age Ranges | Diverse Flag | URM Flag | Gender | International Flag
 - Budget Group Slicer Panel
 - Budget Group | Budget Group Enrollment Status | Budget Group Admit Status | Budget Group Term
 - Award Slicer Panel
 - Award Code | Award Description | Funded & Unfunded Flag | Aid Type | Fund, Activity, Object

Data Visualizations

- Spreadsheet: Active Awards Spreadsheet
 - Academic Year | Active Awarded Aid | Active Transmitted Aid | Difference (Awarded but Not Transmitted)

[Page: UG & Not in Enrolled Student Snapshot Term PiT](#)

This is the first page in the report which features the two date selection slicers. Step by step instructions are included for the date selection section as it is important to determine what date is being selected with each Relative Date slicer selection. This page is also filtered to only undergraduate students and those who are not in the enrolled student snapshot.

Slicers

- Pulldown: Academic Year | Term Type | Term Group | Reference Term
 - Enrolled Student Snapshot Slicer Panel
 - Academic Level, Class | Admit Status | Enrollment Status | Age Ranges | Diverse Flag | URM Flag | Gender | International Flag
 - Budget Group Slicer Panel
 - Budget Group | Budget Group Enrollment Status | Budget Group Admit Status | Budget Group Term
 - Award Slicer Panel
 - Award Code | Award Description | Funded & Unfunded Flag | Aid Type | Fund, Activity, Object
- Interactable: Date of Interest | Relative Days #1 | Relative Days #2
- Other: Days Relative to Term Start

Data Visualizations

- Spreadsheet: UG & Not in enrolled Student Snapshot Term PiT Spreadsheet
 - Category | Award Sum Date #1 | Award Sum Date #2 | Active Transmitted Aid | Rate of Change Date #1 to Date #2 | Rate of Change Date #1 to Transmitted | Rate of Change Date #2 to Transmitted

Page: GR Term PiT

This page has the same structure as the previous but is instead filtered to graduate students only.

Slicers

- Pulldown: Academic Year | Term Type | Term Group | Reference Term
 - Enrolled Student Snapshot Slicer Panel
 - Academic Level, Class | Admit Status | Enrollment Status | Age Ranges | Diverse Flag | URM Flag | Gender | International Flag
 - Budget Group Slicer Panel
 - Budget Group | Budget Group Enrollment Status | Budget Group Admit Status | Budget Group Term
 - Award Slicer Panel
 - Award Code | Award Description | Funded & Unfunded Flag | Aid Type | Fund, Activity, Object
- Interactable: Date of Interest | Relative Days #1 | Relative Days #2
- Other: Days Relative to Term Start

Data Visualizations

- Spreadsheet: GR Term PiT
 - Category | Award Sum Date #1 | Award Sum Date #2 | Active Transmitted Aid | Rate of Change Date #1 to Date #2 | Rate of Change Date #1 to Transmitted | Rate of Change Date #2 to Transmitted

[Page: Full Year Point in Time](#)

This page includes the same relative date filtering section but shows data for two full academic years. These years do not need to be consecutive or chronological, offering the user the greatest flexibility to determine the historical context of these data.

Slicers

- Pulldown: Term Type | Reference Type
 - Enrolled Student Snapshot Slicer Panel
 - Academic Level, Class | Admit Status | Enrollment Status | Age Ranges | Diverse Flag | URM Flag | Gender | International Flag
 - Budget Group Slicer Panel
 - Budget Group | Budget Group Enrollment Status | Budget Group Admit Status | Budget Group Term
 - Award Slicer Panel
 - Award Code | Award Description | Funded & Unfunded Flag | Aid Type | Fund, Activity, Object
- Interactable: Date of Interest | Relative Days #1 | Relative Days #2
- Other: Days Relative to Term Start

Data Visualizations

- Spreadsheet: Full Year Point in Time Selection 1 Spreadsheet
 - Date #1 | Date #2 | Reporting Year | Summer | Fall | Winter | Spring | Total
 - Pulldown: Academic Year | Term
- Spreadsheet: Full Year Point in Time Selection 2 Spreadsheet
 - Date #1 | Date #2 | Reporting Year | Summer | Fall | Winter | Spring | Total
 - Pulldown: Academic Year | Term

[Page: Dynamic 3 Year PiT History](#)

The Dynamic 3 Year PiT History page allows the user to select one year and reference term and then generates a three year history based on those selections.

Slicers

- Pulldown: Academic Year | Term Type | Selected Term | Reference Term
 - Enrolled Student Snapshot Slicer Panel
 - Academic Level, Class | Admit Status | Enrollment Status | Age Ranges | Diverse Flag | URM Flag | Gender | International Flag
 - Budget Group Slicer Panel
 - Budget Group | Budget Group Enrollment Status | Budget Group Admit Status | Budget Group Term
 - Award Slicer Panel
 - Award Code | Award Description | Funded & Unfunded Flag | Aid Type | Fund, Activity, Object
- Interactable: Date of Interest | Relative Days #1 | Relative Days #2

- Other: Days Relative to Term Start

Data Visualizations

- Spreadsheet: Selected Year Dates | Selected Academic Year
 - Date #1 | Date #2 | Academic Year | Summer | Fall | Winter | Spring
- Spreadsheet: Prior Year Dates | Prior Academic Year
 - Date #1 | Date #2 | Academic Year | Summer | Fall | Winter | Spring
- Spreadsheet: 2 Years Prior Dates | 2 Years Prior Academic Year
 - Date #1 | Date #2 | Academic Year | Summer | Fall | Winter | Spring

Page: Weighted Average

The final page of the report is meant to create a forecast for how much aid will be transmitted based on a historical weighted average of awarded aid at the selected point in history. A user can input a weight for each year of data to generate the Transmitted Aid Forecast value.

Slicers

- Pulldown: Academic Year | Term Type | Selected Term | Reference Term
 - Enrolled Student Snapshot Slicer Panel
 - Academic Level, Class | Admit Status | Enrollment Status | Age Ranges | Diverse Flag | URM Flag | Gender | International Flag
 - Budget Group Slicer Panel
 - Budget Group | Budget Group Enrollment Status | Budget Group Admit Status | Budget Group Term
 - Award Slicer Panel
 - Award Code | Award Description | Funded & Unfunded Flag | Aid Type | Fund, Activity, Object
- Interactable: Date of Interest | Relative Days
- Other: Days Relative to Term Start

Data Visualizations

- Spreadsheet: Transmitted Aid and PiT Active Awards
 - Five Years Ago Weight | Four Years Ago Weight | Three Years Ago Weight | Two Years Ago Weight | One Year Ago Weight
- Spreadsheet: Weighted Average Spreadsheet
 - Award Sum | Weighted Average RoC | Transmitted Aid Forecast