

**DM – Expense Trends Reporting Universe**

**Quick Reference Guide**

**Who should use this universe?**

* Any employee who needs to examine summarized expenditure data over time. Especially those who want to examine the impact of Information Technology (IT) expenditures pre-defined by personnel and non-personnel classifications.
* This universe should be used as a supplement to the Expense Trends OLAP Cube. Data supporting this universe was created to support the OLAP Cube and while the OLAP Cube only supports the last five years of data, the universe does have information from Fiscal Year 2005 to present. Tableau also interfaces with these data tables to offer more efficient if not effective reporting options.

**What types of business questions can I answer using this universe?**

* What has my unit spent money over time?
* What spending trends can be identified?
* What has been my department’s IT expense over time?

**Universe Description**

This universe contains finance and human resources (HR) data by CFOAP, vendor/person-position-job, document ID rolled up by fiscal period. The data is updated monthly following the close of the previous fiscal period. The purpose of the data is to allow for the review of performance and reducing cost by analyzing expenditures in the areas of purchases, IT and personnel costs.

**Data Included in Expense Trends Reporting Universe**

* Dollars and Counts
  + Total Expense Amount
  + Total Transaction Number
* CFOAP
  + Codes and Titles
  + Fund, Organization and Account Hierarchies
  + Expense Hierarchy
* Time
  + Fiscal Year and Period, as well as Calendar Year and Month
* Expense Details
  + IT Expense Indicator
  + Posted Document Prefix and Number
  + Purchase Method Code
  + Vendor ID and Name
  + Employee Information
    - Name and UIN
    - Class, Job and Position information
    - Job Detail information including Organization hierarchy

**Universe Tips & Tricks**

* The more limitations you put in the query filter, the better the report will perform. Items from the Time folder and from the CFOAP folder should be included in the query filter, else allow for a prolonged running time.
* To understand the logic used to create this data source, please see the Detailed Analysis Guide located here: <https://www.aits.uillinois.edu/UserFiles/Servers/Server_474/File/DS/BI%20Analytics/ExpenseTrends_Detailed_Analysis_Guide.pdf>
* Other information can be found on the website at: <https://www.aits.uillinois.edu/services/reports_and_data/bi_analytics/expense_trends_analysis/>