




Tuition Control Reports Using Informer

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St. Clair County Community College entrinsicon

- Small two-year school uniquely located in Michigan's thumb founded in 1923
- Informer institution since January 2023 – Three managed service contracts
- Colleague Unidata school



The Problem



- We needed a tuition control report to replace an existing report
- The existing report
 - Outdated Colleague report
 - No longer supported
 - Custom report without clear documentation for fields used

ID NO	Name	Res	Credits	Cnt Hrs	Bil Crds	CEUs	School	Tuition	Tech Fees	Labe Fees	Nrsing Tuition	Flat Fees	Oth Fees	Bks Chgs	Hsng Chgs	Tot Chgs	Adjs	Payments	Refunds	Bal Due	Waiver Amnt	Term
		1	11	12	12	0	DLU1	1788	468	125			297	0	0	2678	0	-3988.5	1310.5	0	0	23/FA
		1	14	15	15	0	1117	2235	585	30			0	314.26	0	3164.26	0	-4673	1508.74	0	0	23/FA
		2	14	14	14	0		3864	546				198	183.72	0	4791.72	0	-7209	2417.28	0	0	23/FA
		1	12.5	19.5	19.5	0	DLS1*		760.5	75	3958.5		198	0	0	4992	0	-4992		0	0	23/FA
		2	4	5	5	0		1380	195	30			99	0	0	1704	-1704	0		0	0	23/FA

Project Background



- We built various iterations of the report along the way while trying to streamline the process.
- Used the summary only view to total columns
- This captured the necessary information, but had several limitations

informer Search anything (Ctrl + Space)...

Home / Datasets / CURRENT 25/SU Tuition Control Report - Invoices (Run Payments First)

CURRENT 25/SU Tuition Control Report - Invoices (Run Payments First) EDIT REFRESH

Exclude Current Residency Status is Missing Filter

Term Add Group Summary Only RESET VIEW Columns Aggregates Options

se Cr...	Sec Billin...	Contact H...	Tuition Charge	Tech Fees C...	Lab Fees C...	Nursing Tuition C...	Online Fees ...	High Cost ...	Book Fees ...	Housing Ch...	Waiver Ch...	Flat Fees ...	Total Charges	Adjustme...	Non FA Pa...	FA Payme...	Sponsor P...	Payments...	Balance D...
um	Sum	Sum	Sum	Sum	Sum	Sum	Sum	Sum	Sum	Sum	Sum	Sum	Sum	Sum	Sum	Sum	Sum	Sum	Sum
429.70	7,616.10	7,616.10	1,096,538.00	304,644.00	28,300.00	371,410.10	170,976.00	1,952.00	44,613.40	18,875.00	-8,544.60	0.00	2,028,763.90	-659.00	206,175.88	1,652,204.07	19,058.96	1,877,438.91	-150,665.99

Report Limitations

1. Long run time
2. Manually changing criteria each month
3. Manually running two reports for each term (payments and invoices datasets)
4. Controller was dependent on IR running the report each month
5. Terms were separate reports
6. Couldn't filter by date because dates were in arrays

al Charges ▼	Adjustments Charge ▼	Arp Date ▼	TC
2,242.00	0.00	6/25/2025 6/23/2025	
2,821.00	0.00	6/17/2025	
3,735.60	0.00	6/17/2025 6/23/2025	
903.00	0.00	6/23/2025	
876.00	0.00	5/18/2025	
0.00	0.00		
1,559.00	0.00	6/23/2025 6/25/2025	
683.00	0.00		
1,366.00	0.00	5/16/2025	
2,634.00	0.00	6/25/2025 6/17/2025 4/21/2025	

Streamlining the Process

- To reduce the number of datasets for the existing report, we rethought our approach.
- We still needed two datasets – AR.PAYMENT.ITEMS and AR.INVOICES but by finding the allocation source, transaction type, and date and putting each item in its own row we went from this

to this

 Tuition Control - AR.PAYMENT.ITEMS - **STEP 1** - Entrinsicon

 Tuition Control - MAIN - **STEP 2** - Entrinsicon

 **CURRENT** 24/FA Tuition Control Report - Invoices (Run Payments First)

 **CURRENT** 24/FA Tuition Control Report - Payments

 **CURRENT** 24/SU Tuition Control Report - Invoices (Run Payments First)

 **CURRENT** 24/SU Tuition Control Report - Payments

 **CURRENT** 25/FA Tuition Control Report - Invoices (Run Payments First)

 **CURRENT** 25/FA Tuition Control Report - Payments

 **CURRENT** 25/SU Tuition Control Report - Invoices (Run Payments First)

 **CURRENT** 25/SU Tuition Control Report - Payments

 **CURRENT** 25/WI Tuition Control Report - Invoices (Run Payments First)

 **CURRENT** 25/WI Tuition Control Report - Payments

Rethinking Our Approach

✓ Previous dataset used columns

Housing Charge	Waiver Charge	Flat Fees Charge	Tuition Charge	Total Charges	Adjustments Charge	Arp Date	Non FA Payment/Refund	FA Payment/Refu...	Sponsor Payment/Ref...	Payments/refunds	Balance Due
0.00	0.00	0.00	1,530.00	2,242.00	0.00	6/25/2025 6/23/2025	-827.00 0.00	0.00 3,069.00	0.00 0.00	2,242.00	0.00
0.00	0.00	0.00	1,989.00	2,821.00	0.00	6/17/2025	0.00	2,821.00	0.00	2,821.00	0.00
0.00	0.00	0.00	0.00	3,735.60	0.00	6/17/2025 6/23/2025	0.00 0.00	1,332.60 2,403.00	0.00 0.00	3,735.60	0.00
0.00	0.00	0.00	612.00	903.00	0.00	6/23/2025	0.00	903.00	0.00	903.00	0.00
0.00	0.00	0.00	612.00	876.00	0.00	5/18/2025	876.00	0.00	0.00	876.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00					0.00	0.00
0.00	0.00	0.00	1,071.00	1,559.00	0.00	6/23/2025 6/25/2025	0.00 -586.00	2,145.00 0.00	0.00 0.00	1,559.00	0.00
0.00	0.00	0.00	459.00	683.00	0.00					0.00	-683.00
0.00	0.00	0.00	918.00	1,366.00	0.00	5/16/2025	1,366.00	0.00	0.00	1,366.00	0.00
0.00	-1,101.60	0.00	0.00	2,634.00	0.00	6/25/2025 6/17/2025 4/21/2025	-2,550.00 0.00 2,634.00	0.00 2,550.00 0.00	0.00 0.00 0.00	2,634.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00					0.00	0.00
0.00	0.00	0.00	612.00	980.00	0.00	6/17/2025	0.00	980.00	0.00	980.00	0.00
0.00	0.00	0.00	3,976.00	4,952.00	0.00	6/17/2025 6/23/2025	0.00 0.00	1,255.00 3,697.00	0.00 0.00	4,952.00	0.00
0.00	0.00	0.00	0.00	3,636.00	0.00	6/17/2025	0.00	3,636.00	0.00	3,636.00	0.00
0.00	0.00	0.00	918.00	1,262.00	0.00	6/17/2025	1,262.00	0.00	0.00	1,262.00	0.00
0.00	0.00	0.00	459.00	683.00	0.00	4/14/2025	683.00	0.00	0.00	683.00	0.00
Sum 18,875.00	Sum -12,059.60	Sum 0.00	Sum 1,113,055.00	Sum 2,047,822.86	Sum -659.00		Sum 206,175.88	Sum 1,652,204.07	Sum 19,058.96	Sum 1,877,438.91	Sum -169,724.95

Rethinking Our Approach


- ✓ Rows instead of arrays in columns
- ✓ Finding transaction type (charge or payment), transaction detail (type), date, and amount

Term invTerm	Person Id invPersonId	First Name person_firstName	Last Name person_LastName	Transaction Type TransactionType	Transaction Detail TransactionDetail	Transaction Date TransactionDate	Transaction Amount TransactionAmount
25/WI				Invoiced Item	Online Fees Charge	1/6/2025	104.00
25/WI				Invoiced Item	Tech Fees Charge	1/6/2025	120.00
25/WI				Invoiced Item	Tuition Charge	1/6/2025	459.00
25/WI				Invoiced Item	Online Fees Charge	1/6/2025	104.00
25/WI				Invoiced Item	Tech Fees Charge	1/6/2025	120.00
25/WI				Invoiced Item	Tuition Charge	1/6/2025	459.00
25/WI				Invoiced Item	Online Fees Charge	1/6/2025	104.00
25/WI				Invoiced Item	Tech Fees Charge	1/6/2025	160.00
25/WI				Invoiced Item	Tuition Charge	1/6/2025	612.00
25/WI				Invoiced Item	Online Fees Charge	1/6/2025	104.00
25/WI				Invoiced Item	Tech Fees Charge	1/6/2025	120.00
25/WI				Invoiced Item	Tuition Charge	1/6/2025	459.00
25/WI				Invoiced Item	Book Fees Charge	1/8/2025	402.49
25/WI				Payment	Student Payment	5/1/2025	121.67
25/WI				Payment	Financial Aid Payment	3/13/2025	-2,475.00
25/WI				Payment	Student Payment	3/25/2025	2,475.00
25/WI				Payment	Student Payment	2/26/2025	2,365.15
25/WI				Payment	Financial Aid Payment	2/14/2025	-6,172.00

Using the Data

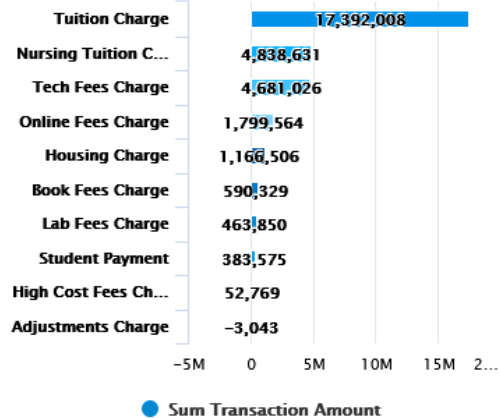
- Tuition Control dashboard with filters
- Pivot tables and visuals

CONTROLLER - Tuition Control Dashboard EDIT REPORT



ST. CLAIR COUNTY COMMUNITY COLLEGE
SC4
TUITION CONTROL
DASHBOARD

Transaction Date Start Date End Date <small>Dates are America/New_York, and keyword</small>	Term Select a value
Transaction Type Select a value	Student ID Include leading zeros Select a value
Transaction Detail Select a value	Student Last Name Case sensitive Enter value

Total Charges
Sum Transaction Amount


Category	Amount
Tuition Charge	17,392,008
Nursing Tuition C...	4,838,631
Tech Fees Charge	4,681,026
Online Fees Charge	1,799,564
Housing Charge	1,166,506
Book Fees Charge	590,329
Lab Fees Charge	463,850
Student Payment	383,575
High Cost Fees Ch...	52,769
Adjustments Charge	-3,043

Using the Data - Dashboard

Transaction Detail by Person and Term

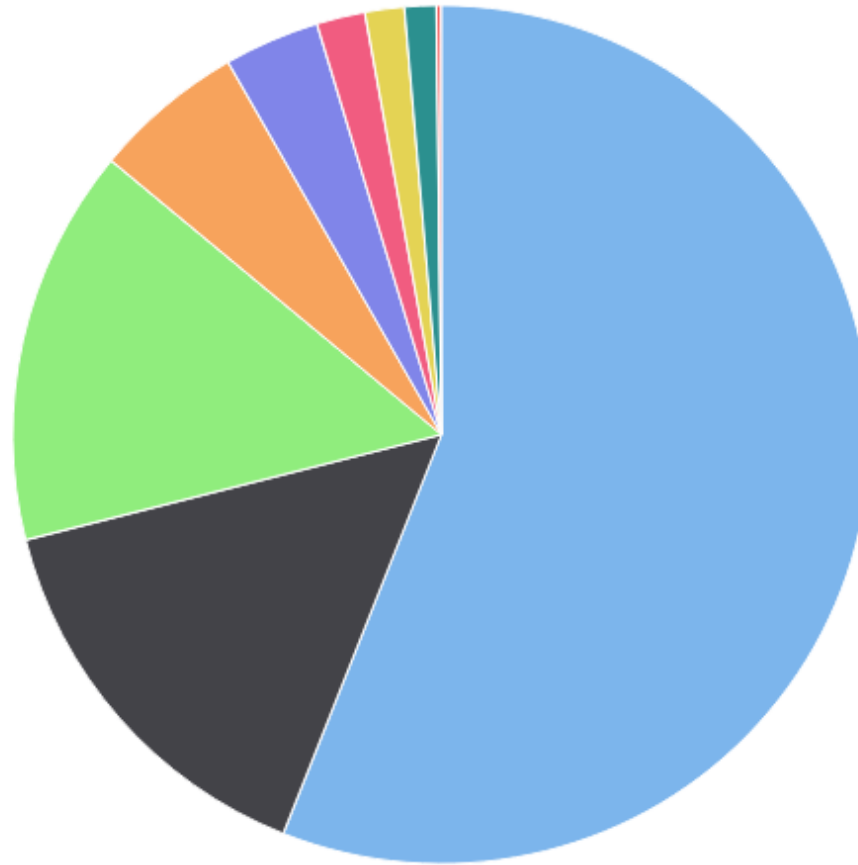
Sum Transaction Amount



Term	Person Id	Last Name	First Name	Nursing Tuition Charge	Online Fees Charge	Tech Fees Charge	Tuition Charge	Financial Aid Payment	Student Payment	Sum Transaction Amount
24/FA						800.00	3,060.00	-7,708.00	3,848.00	
24/FA	00			794.20	312.00	312.00	612.00	-2,403.00	-94.51	-16.02
24/FA					208.00	240.00	918.00	-1,703.00	337.00	
24/FA	00			3,866.50		740.00		-5,751.50	579.49	-7.01
24/FA					0.00	0.00	0.00			
24/FA					208.00	240.00	918.00	-1,849.00	69.44	-23.41
24/FA					520.00	680.00	4,828.00	-11,376.00	3,962.41	-78.43
24/FA	00			7,300.80	208.00	864.00		-8,726.80	150.00	-0.00
24/FA						0.00	0.00			
24/FA	00			4,514.40	208.00	864.00		-5,790.40		
24/FA					208.00	240.00	918.00	-1,999.00	349.67	-15.59
24/FA	00			3,344.00		640.00		-4,394.00		
24/FA					0.00	0.00	0.00			
24/FA					520.00	720.00	5,112.00	-5,669.00	-683.00	
24/FA	99			4,765.20		912.00		-3,848.00	-2,155.19	-0.00
24/FA					208.00	280.00	1,988.00		-2,476.00	
24/FA	00				0.00	400.00	1,530.00			0.00
24/FA	33			4,838,630.75	1,799,564.00	4,681,026.00	17,392,008.00	-17,621,481.12	383,575.27	7,746,294.40

Using the Data - Dashboard

Sum of Transaction by Type
Sum Transaction Amount



- | | | | | |
|------------------|-------------------------|------------------------|-----------------------|--------------------|
| Tuition Charge | Tech Fees Charge | Nursing Tuition Charge | Online Fees Charge | Housing Charge |
| Book Fees Charge | Lab Fees Charge | Student Payment | High Cost Fees Charge | Adjustments Charge |
| Waiver Charge | Sponsor Billing Payment | Financial Aid Payment | | |

Tuition Control Report



- The tuition control report has
 - simplified the Informer datasets
 - streamlined business processes
 - utilized a dashboard to increase the accessibility of the data for other purposes

Informer Demonstration



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