Copy of BOT Calculated Revenue

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1. Purpose – The Balance of Trade Calculated Revenue dashboard calculates the total revenue attributable to a school's students and courses when total revenue is calculated using the parameters of the balance of trade (BoT) model. It shows, for example, what portion of this total calculated revenue is generated by BoT flows. Course-level drill provides a complete accounting of the BoT calculated revenue for every course, including revenue associated with student/course combinations that do not generate BoT flows.

This dashboard contains two pages:

- **Calculated Course Revenue** – This page displays the total revenue attributed to a school's courses by the BoT rules. That total is segregated into categories, including the portion generated by students from other schools who generate a BoT in transfer.
- **Calculated Student Revenue** – This page displays the total revenue assigned to a school's students by the BoT rules. That total is segregated into categories, including the portion in courses outside the students' home school which generate a BoT out transfer.

Each page contains four tables:

- A summary distribution of the total revenue in a school's courses or generated by its students.
- A summary of the students and units that are useful for documenting the relationship between the metrics on this dashboard and the Cro Enrollment dashboard.
- A summary showing how total revenue is distributed by school.
- Course level revenue with drill to detail showing how BoT rules generated the revenue. A descending sort can be applied to any of the columns to identify top contributors.

2. Fact Amounts –

- **Calculated Course Revenue**: The total revenue attributed to a school's courses by the balance of trade model is displayed in the following categories:
  - **BoT In Other Schools**: This is the calculated revenue a school receives for teaching students from other schools, identified in the balance of trade model by academic group.
  - **BoT In Internal: Teaching Allocation**: This is generated for schools in which there are different academic group codes for undergraduate and graduate students. In those schools, the balance of trade model generates flows within, or internal to, the school. For example, the Silver School of Social Work has separate academic group codes for undergraduate students (US) and graduate students (GS). When a GS course is taken by a US student, the teaching unit (GS) receives the balance of trade inflow categorized as “internal: teaching allocation” and the student's (US) receives the student's school allocation categorized as “balance of trade internal: student allocation.”
  - **BoT In Total**: This is the sum of balance of trade in other schools and balance of trade internal: teaching allocation.
  - **BoT Internal: Student Allocation**: This is generated for schools in which there are different academic group codes for undergraduate and graduate students as the complement of balance of trade internal: teaching allocation. See explanation above.
  - **Teaching School No Flow**: This is the balance of trade model revenue associated with course enrollments in which the course academic group code is the same as the student academic group code.
  - **Teaching School Total**: This is balance of trade In total + balance of trade internal: student allocation + teaching school no flow.
  - **Other Schools’ Balance of Trade Allocation**: This is the portion of revenue attributable to the student school when students take courses outside their own school.
  - **Provost**: This is the portion of revenue assigned to the provost by balance of trade rules.
  - **Total Calculated Course Revenue**: This equals teaching school total + other schools’ balance of trade allocation + provost. Total calculated revenue is calculated as teaching school balance of trade In + home school balance of trade In + Provost In.

- **Calculated Student Revenue**: The total revenue attributed to a school's students by the BoT model is displayed in the following categories:
  - **BoT Out Other Schools**: This is the calculated revenue a school receives for teaching students from other schools, identified in the BoT model by academic group.
  - **BoT Out Internal: Teaching Allocation**: This is the revenue assigned to the teaching academic group code for courses internal to a school in schools with internal BoT flows, as described above.
  - **BoT Out Total**: This equals BoT Out Other Schools + BoT Out Provost + BoT Out Internal: Teaching Allocation
  - **BoT Internal: Student Allocation**: This is the revenue assigned to the student's academic group code for courses internal to a school in schools with internal BoT flows, as described above.
  - **BoT External: Student School Allocation**: This is the revenue assigned to the student's school when a student takes a course in another.
**Student School NoFlow** – This is the BoT model revenue associated with course enrollments in which the course academic group code is the same as the student academic group code.

**Student School Total** – This equals Student School NoFlow + BoT Internal: Student Out within School + Student School BoT Internal + Student School BoT from Other Schools’ Courses

### 3. Examples –

### 4. User Notes –

Please note that this dashboard can be filtered by department but departments are not assigned to the academic group categorization used in the BoT model. It is necessary to use the search functionality to select departments.

The calculated course revenue metrics relate to others as follows:

- BoT In Total = BoT In on the Balance of Trade dashboard except where filter differences apply
- BoT In Total = BoT In on the Cross enrollment dashboard
- BoT In Other School and BoT Internal: Student Allocation can be seen in the net flow analysis detail
- Inflow Units = Inflow Units on the Cross Enrollment dashboard
- Total Units = Inflow Units + Other Units in the net flow analysis
- Inflow Headcount = Inflow Enrollment Headcount on the Cross Enrollment Summary page
- Teaching School No Flow on the Calculated Course Revenue page = Teaching School No Flow on the Calculated Student Revenue page.

The Calculated Student Revenue metrics relate to the others as follows:

- BoT Out Total = BoT Out on the Balance of Trade dashboard except where filter differences apply
- BoT Out Total = BoT Out on the Cross Enrollment dashboard
- BoT Out Other Schools and BoT Out Within School can be seen in the Net Flow Analysis detail.
- Outflow Units = Outflow Units on the Cross Enrollment dashboard.
- Total Units = Outflow Units + Other Units in the Net Flow Analysis.
- Outflow Headcount = Outflow Enrollment Headcount on the Cross Enrollment Summary page.
- Teaching School NoFlow on the Calculated Course Revenue page = Student School NoFlow on the Calculated Student Revenue page.

### 5. Additional Reports –

The Balance of Trade Calculated Revenue dashboard complements the Balance of Trade dashboard, which provides detail on balance of trade budget transfers, and the Cross Enrollment dashboard, which provides a university-wide summary and comparison of a school's in- and outflows.