

## GFS1004 - Design Document - FINAL

This design document serves as the blueprint for the GFS1004 course, showing content that will be covered and how it will be presented, to ensure all project stakeholders are aligned on the plan before development begins.

The course will be developed in accordance with proven adult learning theories, including [Merril's Instructional Design Principles](#), [Bloom's Taxonomy](#) and [Kirkpatrick's 4 Levels of Evaluation](#), and will be authored in Articulate Rise 360, with animated sequences produced using Vyond.

### Other Project Documents:

Project Timeline

Needs Analysis Report

|               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
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| Course Title: | GFS1004 - Verifying Graduate Student Funding: A Guide to Reporting Tools                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|               | <p><b>Course Description:</b></p> <p>This online self-paced course provides Student Support Officers (SSOs) with the foundational knowledge and skills to effectively build, run and use reports associated with graduate student funding. Moving beyond a simple list of reports, this training empowers users to find the data they need, use the appropriate tools for analysis, and ask for help when necessary. The course will teach learners how to use the Student Services Reporting Catalog (SSRC) to find reports, differentiate between static GFS BI reports and customizable SIRIS dashboards, and leverage the powerful features of SIRIS to reduce reliance on manual "shadow" systems, such as personal spreadsheets. At the conclusion of this course, users will be able to leverage Stanford's reporting resources for auditing graduate student funding packages and the associated requirements for setting them up.</p> |

### Training Sequence:

This course is part of a series of onboarding courses created to prepare staff to work within GFS to support Stanford's graduate students, postdoctoral scholars, and non-matriculated student populations, ensuring their funding is timely, accurate, and in compliance with both university and funding-specific policies.

GFS1000 - Introduction to Managing Financial Support in GFS

GFS1001 - Managing Graduate Aid in GFS

GFS1002 - Managing Postdoctoral Support in GFS

GFS1003 - Managing Support for Non-Matrics in GFS

### **GFS1004 - Verifying Graduate Student Funding: A Guide to Reporting Tools**

### Goals:

The following instructional goals define the strategic purpose of this course and the intended impact of the learning experience on the new user:

**Mitigate Institutional Risk:** Transition staff away from unreliable and insecure "shadow systems" such as personal spreadsheets by equipping them to use official, centrally-managed reporting tools that ensure data integrity and operational efficiency.

- **Differentiate Between Core Reporting Tools:** Equip users to accurately distinguish between the capabilities of static, operational GFS BI reports and dynamic, analytical SIRIS dashboards.
- **Streamline the Report Discovery Process:** Position the SSRC as the primary and most efficient entry point for all GFS reporting, empowering users to quickly locate correct tools.
- **Execute Foundational Reporting Tasks:** Build user proficiency in applying filters, generating, and exporting GFS BI reports to reliably perform essential operational duties.

- **Empower Data-Driven Decision Making:** Enable users to move beyond viewing static data by customizing SIRIS dashboards, equipping them to manipulate, pivot, and analyze information to answer complex analytical questions and generate novel insights.
- **Build Sustainable Reporting Workflows:** Foster long-term user efficiency by training staff to save, manage, and set default views for their customized SIRIS dashboards.
- **Instill a Self-Service Problem-Solving Model:** Embed the "Find, Use, Ask" framework as a core competency, providing users with a repeatable methodology for independently identifying a business need, deploying the correct tool, and knowing when to escalate for support.
- **Demystify the Support Ecosystem:** Provide users with a clear roadmap of the help landscape, enabling them to confidently identify and contact the correct support channel for GFS BI report issues, SIRIS dashboard inquiries, or system access requests.
- **Clarify System Access and Compliance Pathways:** Equip users and their managers with a definitive guide to the prerequisite training and authority-granting procedures, streamlining the onboarding process and ensuring compliance for accessing all GFS reporting systems.
- **Ensure Successful Skill Transference to the Workplace:** Identify and apply course concepts to realistic, scenario-based challenges, providing confidence to both the user and the institution that the training has resulted in measurable job-readiness.

#### **Learning Objectives:**

By the end of this course, staff members with graduate student funding responsibilities will be able to:

- Differentiate between the capabilities of GFS BI reports and SIRIS dashboards.
- Utilize the Student Services Reporting Catalog to select the most relevant graduate student funding reports or dashboard.
- Apply specific search parameters to a GFS BI report to isolate data for a targeted student group.
- Analyze SIRIS dashboard descriptions to select the correct dashboard for answering a specific business question.

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|                          | <ul style="list-style-type: none"> <li>● Customize a SIRIS dashboard to answer a specific business question and save the view for future use.</li> <li>● Illustrate the process for identifying the correct support channel for reporting questions, access requests or SIRIS dashboard customizations.</li> </ul> |
| Time to complete course: | 45 minutes <i>*estimated</i>                                                                                                                                                                                                                                                                                       |

| Course Home Page:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |            |
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| Content:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Block Type |
| <ol style="list-style-type: none"> <li>1. Welcome</li> <li>2. Save Your Progress               <ol style="list-style-type: none"> <li>a. Always use the Exit Course button</li> <li>b. Email GFS/<a href="#">GFS SNOW</a> ticket for assistance with course</li> </ol> </li> <li>3. Accessibility               <ol style="list-style-type: none"> <li>a. Contact <a href="#">SAS/UXDS</a> if you encounter any barriers</li> </ol> </li> <li>4. Select the Start Course button to begin the course</li> </ol> | Text       |

| Lesson 1: Course Introduction                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |            |
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| Content                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Block Type |
| <p>01: Introduction:</p> <ol style="list-style-type: none"> <li>1. Welcome <ol style="list-style-type: none"> <li>a. Narrator introduction</li> <li>b. Addressing the business problem: <ol style="list-style-type: none"> <li>i. Inefficiency and risk of "shadow spreadsheets."</li> </ol> </li> <li>c. What you will learn: <ol style="list-style-type: none"> <li>i. GFS Reporting Overview</li> <li>ii. The Find, Use, Ask model <ol style="list-style-type: none"> <li>1. Accessing GFS BI reports &amp; SIRIS dashboards</li> <li>2. Modifying SIRIS dashboards</li> <li>3. Saving reports and dashboards for future use</li> <li>4. Knowing how to reach out for assistance with GFS BI reports &amp; SIRIS dashboards</li> </ol> </li> </ol> </li> <li>d. Field Notes <ol style="list-style-type: none"> <li>i. Insider tips on working with reporting in GFS</li> </ol> </li> <li>e. SSOs we'll meet during this course <ol style="list-style-type: none"> <li>i. Justin <ol style="list-style-type: none"> <li>1. A new SSO at the School of Engineering</li> <li>2. One of his students is Liam, a VSR from the GFS1003 course</li> <li>3. Needs access to GFS BI reports</li> </ol> </li> <li>ii. Helen</li> </ol> </li> </ol> </li> </ol> | Video      |

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| <ol style="list-style-type: none"> <li>1. SSO in Humanities &amp; Sciences with 14 years of experience at Stanford</li> <li>2. Works with the graduate students in History, including Sophia, our PhD student from the GFS1001 course</li> <li>3. Uses a 'shadow spreadsheet' passed down to her that she's been using for years</li> <li>4. Discovers that SIRIS dashboard can give them the info they need <ol style="list-style-type: none"> <li>a. Also explores requesting a custom dashboard</li> </ol> </li> </ol> <p>e. Let's get started - Learning Objectives</p>                                                                                                                                                                                                                                                             |                                   |
| <p><b>02: Learning Objectives:</b></p> <ol style="list-style-type: none"> <li>1. Differentiate between the capabilities of GFS BI reports and SIRIS dashboards.</li> <li>2. Utilize the Student Services Reporting Catalog to select the most relevant graduate student funding reports or dashboard.</li> <li>3. Apply specific search parameters to a GFS BI report to isolate data for a targeted student group.</li> <li>4. Analyze SIRIS dashboard descriptions to select the correct dashboard for answering a specific business question.</li> <li>5. Customize a SIRIS dashboard to answer a specific business question and save the view for future use.</li> <li>6. Illustrate the process for identifying the correct support channel for reporting questions, access requests or SIRIS dashboard customizations.</li> </ol> | <p>Rise<br/>Bulleted<br/>List</p> |

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| Lesson 2: The Reporting Landscape                                                                                                                                     |            |
| <p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>• Differentiate between the capabilities of GFS BI reports and SIRIS dashboards.</li> </ul> |            |
| Content                                                                                                                                                               | Block Type |

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| <p><b>03: Where to Find Reports:</b></p> <ol style="list-style-type: none"> <li>1. Student Services Reporting Catalog - Your starting point for discovery. <ol style="list-style-type: none"> <li>a. The Catalog is a central, searchable index.</li> <li>b. Accessible on the GFS Reporting Page <ol style="list-style-type: none"> <li>i. GFS-Reports.Stanford.edu</li> </ol> </li> </ol> </li> <li>2. The catalog allows you to access two types of GFS reports: <ol style="list-style-type: none"> <li>a. <b>GFS BI Reports:</b> The "OGs" - Static and operational - for all populations. <ol style="list-style-type: none"> <li>i. Static, operational reports</li> <li>ii. Good for specific tasks, for example: <ol style="list-style-type: none"> <li>1. To view an aid summary for individual students: <ol style="list-style-type: none"> <li>a. GFS Aid Summary for Student for Grad Students, Postdocs and Non-Matric populations</li> </ol> </li> <li>2. To view students who currently have unapplied aid: <ol style="list-style-type: none"> <li>a. Unapplied Aid Report</li> </ol> </li> </ol> </li> <li>iii. Covers Grad students, postdocs &amp; non-matric populations <ol style="list-style-type: none"> <li>1. Helen &amp; Justin will both find useful data for their student populations</li> </ol> </li> </ol> </li> <li>b. <b>SIRIS Dashboards:</b> Analytical and flexible. <ol style="list-style-type: none"> <li>i. Customizable</li> <li>ii. Analytical <ol style="list-style-type: none"> <li>1. With value-added derived fields coded with custom logic <ol style="list-style-type: none"> <li>a. These fields don't exist in PeopleSoft tables or the older BI reports. <ol style="list-style-type: none"> <li>i. Term GFS aid indicator</li> <li>ii. Minimum funding amounts</li> </ol> </li> </ol> </li> </ol> </li> <li>iii. Connects funding with plan/enrollment data <ol style="list-style-type: none"> <li>1. In addition to funding data: <ol style="list-style-type: none"> <li>a. Units in progress</li> </ol> </li> </ol> </li> </ol> </li> </ol> </li> </ol> | <p>Video</p> |
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| <ul style="list-style-type: none"> <li> <ul style="list-style-type: none"> <li>b. GPA</li> <li>c. Enrollment Status</li> <li>d. Academic level</li> </ul> </li> <li>iv. SIRIS data is only available for the graduate student population           <ul style="list-style-type: none"> <li>1. Helen can use SIRIS for her H&amp;S grad students</li> <li>2. Justin can't use SIRIS because VSR data is not supported</li> </ul> </li> <li>v. SSOs can reach out to the IR&amp;DS SIRIS team for custom dashboards           <ul style="list-style-type: none"> <li>1. A good resource for Helen because:               <ul style="list-style-type: none"> <li>a. She's working with a 'shadow spreadsheet'</li> <li>b. She will find info/data they weren't aware of</li> <li>c. She can request a custom dashboard if needed                   <ul style="list-style-type: none"> <li>i. For Example: Adding student tuition group to a report so she can easily identify students on TGR</li> </ul> </li> </ul> </li> </ul> </li> </ul> |                   |
| <b>Field Note:</b> <ul style="list-style-type: none"> <li>● It's a lot to keep track of, but SSOs will find it useful to have access to both GFS BI and SIRIS reports.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Rise Custom Block |
| <b>Check For Understanding:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                   |

### Lesson 3: Locating Your Reporting Resources

#### Learning Objectives:

- Utilize the Student Services Reporting Catalog to select the most relevant graduate student funding reports or dashboard.

| Content                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Block Type         |
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| <p><b>04: The Student Services Reporting Catalog (SSRC)</b></p> <ol style="list-style-type: none"> <li>1. Demonstrate how to access the Student Services Reporting Catalog (SSRC). <ol style="list-style-type: none"> <li>a. Navigate to <a href="https://GFS-Reports.Stanford.edu">GFS-Reports.Stanford.edu</a></li> <li>b. Select the SSRC link</li> <li>c. The SSRC opens <ol style="list-style-type: none"> <li>i. Use filters in upper-right tile to select GFS from the Topic dropdown menu <ol style="list-style-type: none"> <li>1. A table containing Folders for GFS BI Reports &amp; SIRIS Dashboards will display</li> </ol> </li> <li>ii. Let's review the process for accessing the SSRC, then we'll look at how to work with GFS BI Reports and SIRIS Dashboards</li> </ol> </li> </ol> </li> </ol> | Video              |
| <p><b>05: Accessing the SSRC</b></p> <ol style="list-style-type: none"> <li>1. Navigate to <a href="https://GFS-Reports.Stanford.edu">GFS-Reports.Stanford.edu</a></li> <li>2. SSRC link</li> <li>3. The SSRC opens <ol style="list-style-type: none"> <li>a. Use filters in upper-right tile to select GFS from the Topic dropdown menu <ol style="list-style-type: none"> <li>i. A table containing Folders for GFS BI Reports &amp; SIRIS Dashboards will display</li> </ol> </li> </ol> </li> </ol>                                                                                                                                                                                                                                                                                                            | Rise History Block |

#### Lesson 4: Working with the Data You Need in GFS BI Reports

##### Learning Objectives:

- Apply specific search parameters to a GFS BI report to isolate data for a targeted student group.

| Content                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Block Type |
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| <p><b>06: GFS BI Reports in Practice</b></p> <ol style="list-style-type: none"> <li>1. GFS BI Reports in Practice: <ol style="list-style-type: none"> <li>a. Review Characteristics of a GFS BI Report: <ol style="list-style-type: none"> <li>i. Static, operational reports</li> <li>ii. Filterable but not customizable <ol style="list-style-type: none"> <li>1. Can filter by search parameters to access the info you want/need</li> <li>2. Once you've set the parameters for the report, report can't be adjusted or customized</li> </ol> </li> <li>iii. Best for specific operational tasks</li> <li>iv. For example: (what, why &amp; when you'd use them) <ol style="list-style-type: none"> <li>1. Justin needs to look up unapplied aid for VSRs in the School of Engineering</li> </ol> </li> </ol> </li> </ol> </li> <li>2. From the Student Services Reporting Catalog link <ol style="list-style-type: none"> <li>a. Select GFS from the Topic dropdown menu in the Filters section in the upper right corner of the window</li> </ol> </li> <li>3. Select the link for the GFS BI Report Folder you'd like to work with <ol style="list-style-type: none"> <li>a. In this case we're helping Justin look for VSRs in the Engineering program that have unapplied aid. <ol style="list-style-type: none"> <li>i. NM Unapplied Aid Report <ol style="list-style-type: none"> <li>1. For non-matrices</li> </ol> </li> <li>ii. The instruction page will display <ol style="list-style-type: none"> <li>1. Review for any questions you may have</li> <li>2. Note that you must select a value for all fields marked with an asterisk</li> </ol> </li> </ol> </li> </ol> </li> <li>4. Select the tab for the report you'd like to view</li> </ol> | Video      |

- a. GFS VSR Unapplied Aid
- 5. Enter search parameters
  - a. Process by:
    - i. Academic Dept/School
  - b. Term:
    - i. 1266
      - 1. See the table below for a brief explanation of Stanford Term Codes
  - c. Academic Program Status:
    - i. All
  - d. Academic Dept/School:
    - i. ENGINEER - School of Engineering
- 6. Select the Apply button
- 7. Select the GFS VSR Unapplied Aid Report tab
  - a. Review the information
- 8. To Add to Favorites if you'd like to save for future use
  - a. Select the Favorites tab at the upper right of the screen
    - i. Select the Add to Favorites link
  - b. The report will be available to you in the Favorites menu
    - i. Your search parameters will not be saved
    - ii. You'll need to enter them again the next time you open the report
- 9. To Export the report
  - a. Select the Export button in the upper right corner of the tab
  - b. Select the format you'd like to export the report to:

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| <ul style="list-style-type: none"> <li>i. PDF <ul style="list-style-type: none"> <li>1. Select the appropriate button in the upper right to: <ul style="list-style-type: none"> <li>a. Save to a Google drive</li> <li>b. Download the PDF to your device</li> <li>c. Print the PDF</li> </ul> </li> </ul> </li> <li>ii. Excel <ul style="list-style-type: none"> <li>1. The Excel file will be automatically downloaded to your device</li> </ul> </li> </ul> <p>10. Let's take a closer look at Stanford Term codes</p> <ul style="list-style-type: none"> <li>a. Then you'll have the chance to practice working with a GFS BI report on your own</li> </ul> |                   |
| <p><b>07: Stanford Term Codes</b></p> <ul style="list-style-type: none"> <li>a. First digit - Disregard</li> <li>b. Middle 2 digits - Last 2 digits of the Academic Year</li> <li>c. Forth digit - Academic Quarter <ul style="list-style-type: none"> <li>i. 2 - Autumn</li> <li>ii. 4 - Winter</li> <li>iii. 6 - Spring</li> <li>iv. 8 - Summer</li> </ul> </li> <li>d. For example, the term code 1262 would represent the Autumn term of the 2026 academic year, taking place in the fall of 2025.</li> </ul>                                                                                                                                               | Rise Custom Block |
| <p><b>Field Note</b></p> <ul style="list-style-type: none"> <li>● GFS BI reports can be processed using various search criteria, such as Academic Program, PTA, or EmplID. Don't forget to select Apply after updating the search criteria.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                          | Rise Custom Block |

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| <p><b>08: GFS BI Report Review Activity (Storyline Interactive Block)</b></p> <ol style="list-style-type: none"> <li>1. Open the SSRC from the GFS Reporting page</li> <li>2. Open a GFS BI Report</li> <li>3. Select the search parameters             <ol style="list-style-type: none"> <li>a. Process by</li> <li>b. Term</li> <li>c. Academic Program Status</li> <li>d. Academic Dept/School</li> </ol> </li> <li>4. Review Results</li> <li>5. Save the report as a Favorite</li> <li>6. Export the report to Excel</li> </ol> | <p>Rise<br/>Storyline<br/>Interactive<br/>Block</p> |
| <p>Check For Understanding:</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                     |

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| <p>Lesson 5: Working with the Data You Need in SIRIS</p>                                                                                                                                                                                                                                                                |                   |
| <p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>• Utilize SIRIS dashboard descriptions to select the correct dashboard for answering a specific business question.</li> <li>• Customize a SIRIS dashboard to answer a specific business question and save the view for future use.</li> </ul> |                   |
| <p>Content</p>                                                                                                                                                                                                                                                                                                          | <p>Block Type</p> |

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| <p><b>09: The Power of SIRIS: An Introduction:</b></p> <ol style="list-style-type: none"> <li>1. Customizing a SIRIS Dashboard to "Fish" for Your Own Data: <ol style="list-style-type: none"> <li>a. Navigate to the GFS Reports Page <ol style="list-style-type: none"> <li>i. Select Student Services Reporting Catalog (SSRC) link</li> <li>ii. Select GFS from the Topic dropdown menu in the upper right <ol style="list-style-type: none"> <li>1. To view results for a specific tool (GFS BI Reports, or SIRIS dashboards) <ol style="list-style-type: none"> <li>a. Filter your results with the 'Tool' dropdown menu <ol style="list-style-type: none"> <li>i. GFS</li> <li>ii. SIRIS</li> </ol> </li> </ol> </li> </ol> </li> <li>b. Select the dashboard you'd like to work with <ol style="list-style-type: none"> <li>i. Looking for info on all PhD students in History <ol style="list-style-type: none"> <li>1. Start with Graduate Funding by School, Plan or PTA dashboard</li> </ol> </li> <li>ii. Select the Open Report link <ol style="list-style-type: none"> <li>1. Opens to Overview &amp; Appropriate Use page <ol style="list-style-type: none"> <li>a. Convenient to review if you're new to working with SIRIS dashboards</li> <li>b. This tab gives a short description of the reports in the dashboard, key features and defines key terms</li> </ol> </li> <li>2. Select the Tab for the dashboard you'd like to view <ol style="list-style-type: none"> <li>a. Funding by School or Plan</li> </ol> </li> <li>3. Window Elements <ol style="list-style-type: none"> <li>a. Dashboard Prompt Section <ol style="list-style-type: none"> <li>i. Allows you to customize the dashboard</li> </ol> </li> </ol> </li> </ol> </li> </ol> </li> </ol> </li> </ol> </li></ol> | <p>Video</p> |
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- ii. Aid Year set to NULL to avoid information overload when the dashboard opens
      - 1. You must remove the NULL value to run the dashboard
      - 2. You must enter a value in the Aid Year or Aid Term Code field to generate data for the dashboard
      - 3. This is true for all SIRIS dashboards
    - b. Support Tile
      - i. Contains links to helpful resources and a contact link for the SIRIS team
  - c. Selecting dashboard parameters
    - i. Academic Plan
      - 1. History (PhD)
    - ii. Aid Year
      - 1. 2026
    - iii. Select the 'Apply' button
    - iv. Dashboard displays
  - d. Customize the dashboard
    - i. Move a column
      - 1. Select top of Aid Type Code column
      - 2. Drag left and release next to Academic plans column
    - ii. Add a column
      - 1. Right-click in any column header row
      - 2. Hover over Include Column
      - 3. Select the column you'd like to add
        - a. Note that this report has many additional fields for users to add

- b. Including additional information about the students (units in progress, coterm information) and about the aid (charge priority, health only ind, appointment letter information, etc.).
      - c. Info only line indicator or Units in progress
    - 4. The new column is added to the dashboard
  - iii. Add a Pivot Table Prompt
    - 1. You can customize the overall formatting of a dashboard by dragging any column to the 'Pivot Table Prompts' section, which is above the filter indicator section
      - a. Select the area above the title row of the column you'd like to include
        - i. Info Only Line Indicator
      - b. Drag the column to the 'Pivot Table Prompts' section at the top of the dashboard
        - i. You can also right click above the title, hover over the Move column, then select 'To Prompts'
      - c. Changing the parameter of items in the 'Pivot Table Prompts' section updates the data in the dashboard
        - 1. Info Only Line - Yes
        - 2. Units in Progress
          - a. Lets you see students with 0 UIP or any other number
    - 2. Save your customized dashboard
      - a. When you have a dashboard customized the way you like it, you can save it as a default view
        - i. Select the 'Gear' icon in the upper right corner
        - ii. Select 'Save Current Customization'
        - iii. Give the customized dashboard a name

- iv. Select 'Make this my default for this page' if you'd like to page to open to this view automatically
    - v. Select the OK button
  - b. To open one of your customized dashboard views
    - i. Select the 'Gear' icon in the upper right corner
    - ii. Hover over 'Apply Saved Customization' from the dropdown menu
    - iii. Select the saved customization you'd like to open
      - 1. The saved view of the dashboard will open
- 3. Export your dashboard
  - a. You can export your dashboard for viewing outside of SIRIS
    - i. Scroll to the bottom of the report where the Print and Export links are located.
    - ii. Print options:
      - 1. Printable PDF
      - 2. Printable HTML
    - iii. Export options:
      - 1. Formatted
        - a. PDF
        - b. Excel (Recommended)
        - c. Powerpoint
        - d. Web Archive
      - 2. Unformatted options are not recommended unless there is need to do extensive manipulation

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| <p><b>Field Note</b></p> <ul style="list-style-type: none"> <li>The Term GFS Aid Indicator field is a great dashboard to review on a regular basis. It's an easy way to quickly find students without any awarded aid, or with an incomplete, funding package.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <p>Rise<br/>Custom<br/>Block</p>                    |
| <p><b>10: SIRIS Dashboard Review Activity</b></p> <ol style="list-style-type: none"> <li>Open the SSRC from the GFS Reporting page</li> <li>Select a SIRIS Dashboard</li> <li>Select the search parameters             <ol style="list-style-type: none"> <li>Academic Plan: Anthropology (PhD)</li> <li>Aid Year: 2026</li> </ol> </li> <li>Select Apply</li> <li>Review Results</li> <li>Customize the Dashboard             <ol style="list-style-type: none"> <li>Move a Column                 <ol style="list-style-type: none"> <li>Select the area above the Term GFS Aid Ind column to activate it</li> <li>Simulate dragging it to the right of the Academic Plan(s) column by clicking the blue line between the Academic Plan(s) and GFS Entry Ever Ind columns                     <ol style="list-style-type: none"> <li>The Term GFS Aid Ind column has moved</li> </ol> </li> </ol> </li> <li>Move a column to the Pivot Table Prompts section                 <ol style="list-style-type: none"> <li>Select the area above the GFS Entry Ever Ind column to activate it</li> <li>Simulate dragging it up to the Pivot Table Prompts section by selecting the Pivot Table Prompts section at the top of the dashboard                     <ol style="list-style-type: none"> <li>Changing the GFS Aid Entry Ever from N (No) to Y (Yes) by selecting the N dropdown menu</li> </ol> </li> </ol> </li> </ol> </li> </ol> | <p>Rise<br/>Storyline<br/>Interactive<br/>Block</p> |

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| <ol style="list-style-type: none"> <li>1. The dashboard data will be reformatted based on this change</li> </ol> <ol style="list-style-type: none"> <li>7. Save your current customization as a Favorite             <ol style="list-style-type: none"> <li>a. Select the gear icon in the upper right corner of the dashboard</li> <li>b. Select the Save Current Customization link</li> <li>c. Give the customized dashboard a name                 <ol style="list-style-type: none"> <li>i. Enter text: Custom Dashboard</li> </ol> </li> <li>d. Select the OK button                 <ol style="list-style-type: none"> <li>i. The custom dashboard will be saved</li> </ol> </li> </ol> </li> <li>8. Export the report to Excel             <ol style="list-style-type: none"> <li>a. Select the gear icon in the upper right corner of the dashboard</li> <li>b. Select the Export to Excel link</li> <li>c. Select the Export Current Page link                 <ol style="list-style-type: none"> <li>i. The dashboard will be downloaded to your device</li> </ol> </li> </ol> </li> </ol> |  |
| Check For Understanding:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |  |

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| Lesson 6: Utilizing Your Reporting Resources                                                                                                                                                                                 |            |
| <b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>Illustrate the process for identifying the correct support channel for reporting questions, access requests or SIRIS dashboard customizations.</li> </ul> |            |
| Content                                                                                                                                                                                                                      | Block Type |

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| <p><b>11: Utilizing Your Reporting Resources</b></p> <ol style="list-style-type: none"> <li>When to Ask for Help:             <ol style="list-style-type: none"> <li>Reinforce the model: Try to Find and Use first, then Ask.</li> </ol> </li> <li>Who to Ask: The Right Support Channel:             <ol style="list-style-type: none"> <li>For GFS BI report questions or issues - Contact GFS Help.                 <ol style="list-style-type: none"> <li>(<a href="#">Submit a GFS SNOW Ticket</a>)</li> </ol> </li> <li>For SIRIS dashboard questions, issues, or new dashboard ideas - Contact the SIRIS support team @ <a href="mailto:siris-support@lists.stanford.edu">siris-support@lists.stanford.edu</a></li> </ol> </li> <li>Getting Access to GFS BI Reports and SIRIS Dashboards:             <ol style="list-style-type: none"> <li>Contact the <a href="#">designated authority grantor for your specific area of the university</a>.</li> </ol> </li> <li>For access to GFS BI Reports:             <ol style="list-style-type: none"> <li>Users must complete:                 <ol style="list-style-type: none"> <li><a href="#">AS-4000</a> - FERPA Training</li> <li><a href="#">AS-9000</a> - PeopleSoft Concepts and Compliance</li> </ol> </li> </ol> </li> <li>For access to SIRIS:             <ol style="list-style-type: none"> <li>If you are not a SIRIS user, complete two SIRIS prerequisites in STARS:                 <ol style="list-style-type: none"> <li><a href="#">AS-2000</a> - Appropriate Use and Protection of Student Data</li> <li><a href="#">AS-2001</a> - SIRIS Terms of Use Agreement(Search the STARS catalog in Axxess for “AS-2000” and “AS-2001” if the links above do not work)</li> </ol> </li> <li>Users must also complete:                 <ol style="list-style-type: none"> <li><a href="#">AS-9000</a> - PeopleSoft Concepts and Compliance</li> <li><a href="#">GFS-1000</a> - Introduction to Managing Financial Support in GFS</li> </ol> </li> </ol> </li> <li>Once a user has been granted authority and the prerequisites have been completed, they'll be able to access SIRIS Dashboards and GFS BI Reports using the <a href="#">Student Services Reports Catalog</a>, or at <a href="http://bi.stanford.edu">bi.stanford.edu</a>.</li> <li>Staying Informed:             <ol style="list-style-type: none"> <li>Newsletters and other communication channels.                 <ol style="list-style-type: none"> <li>SIRIS website updates page (<a href="https://siris.stanford.edu/updates-siris">https://siris.stanford.edu/updates-siris</a>)</li> <li>Sign up for the quarterly SIRIS newsletter</li> </ol> </li> </ol> </li> </ol> | <p>Video</p> |
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| <ul style="list-style-type: none"> <li>iii. Email the SIRIS team at <a href="mailto:siris-support@lists.stanford.edu">siris-support@lists.stanford.edu</a></li> <li>b. Provide as determined by sponsors.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                          |
| <p><b>12: Who to Ask: Review</b></p> <ul style="list-style-type: none"> <li>1. Who to Ask: The Right Support Channel: <ul style="list-style-type: none"> <li>a. For GFS BI report questions or issues - Contact GFS Help. <ul style="list-style-type: none"> <li>i. (<a href="#">Submit a GFS SNOW Ticket</a>)</li> </ul> </li> <li>b. For SIRIS dashboard questions, issues, or new dashboard ideas - Contact the SIRIS support team @ <a href="mailto:siris-support@lists.stanford.edu">siris-support@lists.stanford.edu</a></li> </ul> </li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <p>Rise Tab Block</p>    |
| <p><b>13: Reporting Access Review</b></p> <ul style="list-style-type: none"> <li>1. Getting Access to GFS BI Reports and SIRIS Dashboards: <ul style="list-style-type: none"> <li>a. Contact the <a href="#">designated authority grantor for your specific area of the university</a>.</li> </ul> </li> <li>2. For access to GFS BI Reports: <ul style="list-style-type: none"> <li>a. Users must complete: <ul style="list-style-type: none"> <li>i. <a href="#">AS-4000</a> - FERPA Training</li> <li>ii. <a href="#">AS-9000</a> - PeopleSoft Concepts and Compliance</li> </ul> </li> </ul> </li> <li>3. For access to SIRIS: <ul style="list-style-type: none"> <li>a. If you are not a SIRIS user, complete two SIRIS prerequisites in STARS: <ul style="list-style-type: none"> <li>i. <a href="#">AS-2000</a> - Appropriate Use and Protection of Student Data</li> <li>ii. <a href="#">AS-2001</a> - SIRIS Terms of Use Agreement(Search the STARS catalog in Axxess for “AS-2000” and “AS-2001” if the links above do not work)</li> </ul> </li> <li>b. Users must also complete: <ul style="list-style-type: none"> <li>i. <a href="#">AS-9000</a> - PeopleSoft Concepts and Compliance</li> <li>ii. <a href="#">GFS-1000</a> - Introduction to Managing Financial Support in GFS</li> </ul> </li> </ul> </li> </ul> | <p>Rise Custom Block</p> |

| Lesson 7: Some Final Thoughts                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |            |
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| Content                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Block Type |
| <p><b>14: University Data AI Policy:</b></p> <ol style="list-style-type: none"> <li>1. Some guidance on university AI policy <ol style="list-style-type: none"> <li>a. University policy and expectations regarding the use of generative and agentic AI in campus systems is evolving rapidly.</li> <li>b. Remember that you are responsible for ensuring the privacy and safety of GFS data and ensuring that you understand Stanford's updated policy on the use of AI in examining that data before using new tools.</li> </ol> </li> </ol> <p><b>15: Summary</b></p> <ol style="list-style-type: none"> <li>1. Review of the the Find, Use, Ask model <ol style="list-style-type: none"> <li>a. Accessing GFS BI reports &amp; SIRIS dashboards</li> <li>b. Modifying SIRIS dashboards</li> <li>c. Saving reports and dashboards for future use</li> <li>d. Knowing how to reach out for assistance with GFS BI reports &amp; SIRIS dashboards</li> </ol> </li> <li>2. Review GFS Reporting Resources for ongoing support <ol style="list-style-type: none"> <li>a. GFS How-To guides @ <a href="https://GFS-Learn.Stanford.edu">GFS-Learn.Stanford.edu</a></li> <li>b. GFS Reporting page @ <a href="https://GFS-Reporting.Stanford.edu">GFS-Reporting.Stanford.edu</a></li> </ol> </li> </ol> | Video      |
| Final Assessment                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |            |

| Content                    | Block Type            |
|----------------------------|-----------------------|
| 16: Final Assessment Intro | Video                 |
| Final Assessment           | Rise Assessment Block |

| Lesson 7: Conclusion                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                 |
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| Content                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Block Type      |
| <b>17: Course Conclusion</b><br>You have completed GFS1004: Reporting on Graduate Student Funding.<br>Let's review our learning objectives for this course                                                                                                                                                                                                                                                                                                                                                                                       | Rise Text Block |
| <b>Learning Objectives:</b> <ol style="list-style-type: none"> <li>1. Differentiate between the capabilities of GFS BI reports and SIRIS dashboards.</li> <li>2. Utilize the Student Services Reporting Catalog to select the most relevant graduate student funding reports or dashboard.</li> <li>3. Apply specific search parameters to a GFS BI report to isolate data for a targeted student group.</li> <li>4. Analyze SIRIS dashboard descriptions to select the correct dashboard for answering a specific business question.</li> </ol> | Bulleted List   |

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| <ol style="list-style-type: none"> <li>5. Customize a SIRIS dashboard to answer a specific business question and save the view for future use.</li> <li>6. Illustrate the process for identifying the correct support channel for reporting questions, access requests or SIRIS dashboard customizations.</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |              |
| <p><b>18: Next Steps</b></p> <ol style="list-style-type: none"> <li>1. Congratulations!             <ol style="list-style-type: none"> <li>a. Completing GFS1004 gives you the essential information you need to begin working successfully with reporting in GFS.</li> </ol> </li> <li>2. GFS Authority             <ol style="list-style-type: none"> <li>a. Visit <a href="https://gfs.stanford.edu/access">https://gfs.stanford.edu/access</a> to find your Authority Grantor</li> </ol> </li> <li>3. Access on-demand resources at GFS-Learn.Stanford.edu</li> <li>4. If you need further assistance:             <p>GFS:</p> <ol style="list-style-type: none"> <li>i. Submit a help ticket to the GFS team</li> </ol> <p>SIRIS</p> <ol style="list-style-type: none"> <li>i. Send an email to the SIRIS team</li> </ol> </li> <li>5. Post-Course Survey             <ol style="list-style-type: none"> <li>a. We'd love to hear your feedback on this course</li> </ol> </li> <li>6. Congratulations and best of luck working with reporting assets for graduate students!</li> <li>7. To ensure your record of successfully completing this course is saved in STARS, select the Exit Course button in the upper right of your screen</li> </ol> | <p>Video</p> |

## 19: Next Steps

1. GFS Authority
  - a. Visit <https://gfs.stanford.edu/access> to find your Authority Grantor
2. GFS-Learn
  - a. Go to GFS-LearnStanford.edu for on-demand resources
3. Help Ticket
  - a. If you need further assistance, please submit a help ticket
4. Post-Course Survey
  - a. We'd love to hear your feedback on this course
5. Course Exit
  - a. Select this button to exit the course and record your results in STARS.

Button  
Stack  
Block