Principal Investigator Reports and UM Analytics Pilot
GMUN October 11, 2011
Agenda

- Brief Summary of efforts to date
- Principal Investigator Reports
- Next Priorities
- UM Analytics (BI) Pilot
- Pilot Objectives
- Peek at a Dashboard
Summary
Reporting Work Group
• Completed deliverables to current reporting environment
  – Immediate improvements
  – Production team structure
  – Infrastructure
    • Performance ~ summary tables
    • Usability ~ flattened tables, associate individuals & groups to chart strings, connected Payroll detail to Finance
  – Roll out of PI Reports
  – Support function
Principal Investigator Focused Reports
(with links & drill-down capabilities – UM Reports)

- Sponsored/Non Sponsored Summary Overall
  - Sponsored Project Summary by Budget Period
  - Non Sponsored Activity by Fiscal Year
  - Sponsored Project Activity by Budget or Project Period
  - Payroll Summary
  - Transaction Detail
Next Priorities

• Monitor UMReport performance
• Fix High priority defects on PI Reports
• Technical infrastructure maintenance & improvements
• Conduct Analysis of use of Sponsored PeopleSoft Reports, & UMReports counts, run times, who is using, functionality that each system offers
  – Redirect specific UMReports to new tables & apply performance modifications
Next Priorities Continued

- Apply new functionality created for PI – focused reports to existing UM Reports
- Medium priority fixes to PI Reports
- High & Medium New Report Requests
- Low Priority defects on PI reports
- Sprinkle in fixes & enhancements to existing financial (non PI) UMReports
- Continue to implement long term process for enhancement identification & prioritization
UM Analytics Pilot (BI)

- October 10 kickoff!
- Over 100 pilot phase participants
  - Casual, Moderate or Formal roles
  - Participants from each role, group (RRC, Unit Accounting, Analyst, PI, etc.) and type of unit
- Feedback loop related to pilot
- Train & Communicate
- Run pilot for about 3 months
What is delivered for the Pilot

• Targeted by group; Principal Investigator, RRC, Accountant
  – Dashboard
  – 1-2 Graphs
  – 2-3 Reports

• Financial data from the General Ledger & Grants Data Marts

• Custom Data Mart for Payroll Detail
Objectives of the Pilot

**Goal of the Pilot:** help us deliver a product that meets the needs of faculty and staff

**How:** Commit time and energy (based on level) to look through and/or create reports and dashboards and provide feedback

- Ease of navigation
- Good naming throughout
- Usefulness of job aids
- Accuracy of Data

- Understandable prompts
- Accuracy of Subtotals
- Good Output Options
A peek at a dashboard
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Sue Paulson
spaul@umn.edu
612-624-5007