Major Accomplishments – UM Reports

- **PI Reports** ➡️ New Designs, Combination of Sponsored & Non-Sponsored Data, Ability to Map Based on Empl ID, Encumber F&A

- **Improved Performance** ★★★

- **Functionality & Enhancements** ➡️ from PI Report to other UMReports; mouse over, sorting, column header, drilldown, etc.

- **New Reports** ➡️ Payroll Detail, Open Encumbrance Summary & Detail, DeptID Approver, Combined Transaction Detail
UM Analytics Pilot
September 2011 – about March 2012

• Lessons Learned
  • Communication and Training must be targeted to unique user groups
  • Experience for “casual” users must be straightforward – these participants didn’t feel they could adequately assess the tool during pilot
  • Can’t implement everyone’s preference on terminology and data set up, but must incorporate user input
  • Data Dictionary must be provided – clear and concise
  • UM Analytics will be able to provide standard reports in a user-friendly format, with easy access
  • Deliverables should be user group based
EFS Reporting Strategy
Short Term Recommendations

1. Complete Deliverables Related to UM Analytics Pilot

2. Transition Standard Delivered Reports to UM Analytics
   - order of transition primarily based on volume of user “hits”

3. Create Principles Around When & Where to Develop Standard Delivered Report
   - in PS, in UM Reports (short term), in UM Analytics
   - concept of standard/widespread application vs. customized information
Short Term Recommendations cont.

4. **Implement Initial Rollout of EFS Content Areas in UM Analytics**
   - General Ledger, ESA, Payroll

5. **Work to Develop UM Analytics Content for the Intended Audiences**
   - Standard Reports & Training for all
   - “Dashboards”/Analyses & Training for those that want the next step
   - BI Publisher Report Development for those at the “top of the pyramid”
6. Create Process to Gather New Requirements/Enhancements/Suggestions (next page)

7. In Partnership with Data Governance, define the structure of Data Dictionary
Gathering Input

- Continue Helpline/Service Center Tickets
- Implement Suggestion Survey on Web Site
- Investigate Ability to Build Links to Provide Suggestions Directly into the Reports in UM Analytics

Building Small User Committee to Help Evaluate & Prioritize Suggestions

Current Examples of things we’re considering:

- College Totals-Sponsored Exp. By mo.- new report
- New chart strings added in last mo. – new “exception” report
- Return account code info for any parameter – new report
- Run Sponsored Awards in Deficit Report by Project
- Accounts Receivable detail by Chart String – new report
# UM Analytics Welcome Page – Mock Up

## U of MN – UM Analytics

### Financial Welcome Page

**U of MN – UM Analytics**

**Search**

**Sign out**

**Financial Welcome Page**

**Home/Catalog/Dashboards/etc/**

## STANDARD DELIVERED REPORTS

<table>
<thead>
<tr>
<th>PI Reports</th>
<th>click on the link above to access PI reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance Reports</td>
<td>click on the link above to access Financial reports</td>
</tr>
<tr>
<td>Analysis &amp; Metrics</td>
<td>click on the link above to access Analysis-focused reports</td>
</tr>
</tbody>
</table>

## AVAILABLE DASHBOARDS

- **Principal Investigator**
  - Table views available of PI Reports and associated graphs

- **Financial Manager**
  - Table views available of all Financial reports and associated graphs

- **Analysis & Metrics**
  - Table views available of reports containing high level metrics to help determine areas of risk, with drills to specific data.

## Links to Other Websites

- [Finsys Website](#)
- [Training Services](#)
- [Help Documents](#)
EFS Reporting Strategy
Medium Term Recommendations

1. Implement Strategy for UM Reports Replacement
2. Coordinate the EFS Reporting Strategy with PS Upgrade and Portal Initiatives
3. Implement Remainder of EFS Content Areas in UM Analytics
4. Develop Data Dictionary for Developer & Report Consumer Use
EFS Reporting Strategy

Long Term Recommendations

1. Cease New Report Development in UM Reports
2. Continue to Support Ways to Access Legacy and PS Data via PS Query, Nvision, Direct Data Connections
3. Make UM Analytics the One Place to Access All Financial Data
4. Work to Reduce Redundancy in Reporting Shadow Systems
5. Maintain & Update Data Dictionary as Necessary
Questions

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