

ESR Targeted SME Session: REPORTING / ACCESS

UC San Diego, Academic Affairs - Resource Administration

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Thank You - We Hear You

- 9 Academic Affairs Sessions with 100+ attendees
 - JSOE • DoBS • GPS
 - DSS • DAH • Quartet
 - DPS • Rady • EVC Units
 - 300+ Challenges (Anonymized & Themed)
 - Change saturation
 - Reporting challenges
 - Training needs
 - Communication challenges
 - Lack of department engagement in decision-making
 - Overall low morale
 - 100+ Potential Solutions
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Session Panelists

SME	Title	ESR System Expertise
Kevin Chou	Dir. of ESR/ Exec. Dir. of ITS	ESR Program
Pearl Trinidad	Executive Director - Business & Financial Services	UC Path
Cheryl Kaino	Sr Dir/Fin Info Svcs - Information Technology Services	Oracle
Brett Pollak	Sr Dir-Cloud/Web Svcs - Information Technology Services	ServiceNOW
Judy White	Director/Bus Intel Analytics - Information Technology Services	ESR
Arlynn Renslow	Director - Business & Financial Services	Oracle
Heather Sears	Director of Oracle Business Information	



Expectations

1. Speak one at a time
 2. Stay on topic
 3. Respect each other's unique experiences
 4. Focus on moving forward in relation to the preidentified priorities
 5. Use the chat freely
 6. Others?
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**Moving
Forward:**

Discussion



ESR Stabilization Discussion



REPORTING



ESR Listening Session Feedback

Increase accuracy of reports (e.g., discrepancies among different reports, users do not trust report data, users creating shadow systems to track and compare to reports, etc.)

SME High-level Progress Summary

Different reports have varying data due to the unique components of the report or project. E.g. A GL-based project balance report may show a different balance than a PPM-based project balance report. We plan to release online, self-paced trainings for each report as well as zoom-based support after each new report release to help meet this need.

Additional Considerations / Next Steps

ESR Stabilization Discussion



REPORTING



ESR Listening Session Feedback

Reduce time to generate reports

SME High-level Progress Summary

New Director of BI and Reporting started 11/15. We will be shifting our report development strategy to assess what reporting tool (Oracle/Cognos/Tableau) is best suited for any given report. Reports built using the activity hubs (Cognos/Tableau) pull locally-stored data that is refreshed nightly. Where reports do not require live data, they will be built using activity hubs for enhanced speed.

Additional Considerations / Next Steps

ESR Stabilization Discussion



REPORTING



ESR Listening Session Feedback

Increase access to reports (e.g., universal role-based access would simplify access issues)

SME High-level Progress Summary

Additional Considerations / Next Steps

ESR Stabilization Discussion



REPORTING



ESR Listening Session Feedback

Simplify/consolidate reports (e.g., have to pull multiple reports to gather a full financial picture, too many reports is overwhelming/causing multiple steps, etc.)

SME High-level Progress Summary

A suite of task-based fund manager dashboards is currently in development with requirements being gathered from fund management SMEs. The goal is that when performing a given task, a fund manager will have everything they need within a single dashboard. We will undertake similar efforts for fiscal managers and fiscal leaders, engaging those groups to understand what tasks they perform and what their data needs are to perform those tasks.

Additional Considerations / Next Steps

ESR Stabilization Discussion



REPORTING



ESR Listening Session Feedback

Improve report functionalities (e.g., search functions, enable a “drill down” into details feature on reports, inconsistent report performance, etc.)

SME High-level Progress Summary

Additional Considerations / Next Steps

ESR Stabilization Discussion



REPORTING



ESR Listening Session Feedback

Provide comprehensive reports that include payroll projections and allow users to manage budgets effectively

SME High-level Progress Summary

BFS reporting team is collaborating with ITS BIA team on development of a payroll projections view in Cognos. Work is underway on a rebuild of the Faculty & Researcher dashboard in Cognos to include payroll projections. Other more comprehensive fund manager dashboard for managing PI reporting is underway, and this will piggyback on the enhancements being made to the Faculty & Researcher dashboard to be able to include payroll projections there as well.

Additional Considerations / Next Steps

ESR Stabilization Discussion



REPORTING



ESR Listening Session Feedback

Increase input from and engagement with end-users (e.g., ensure reports are developed with end-users)

SME High-level Progress Summary

A fund manager reporting work group was established in July to provide input on the development of a new suite of fund manager focused dashboards. Members were targeted as individuals who had already been heavily engaged in reporting efforts--submitting enhancement requests, attending office hours, vocally expressing reporting needs. The group represents all three academic VC areas and a variety of divisions/departments across each VC area, but is intentionally small to be nimble, move quickly, and encourage participation. As we move into development of dashboards for other campus personas (fiscal managers, fiscal leaders), a similar approach will be used. However, we are open to input if the community feels that this approach is not satisfactorily reaching the needs of the entire community.

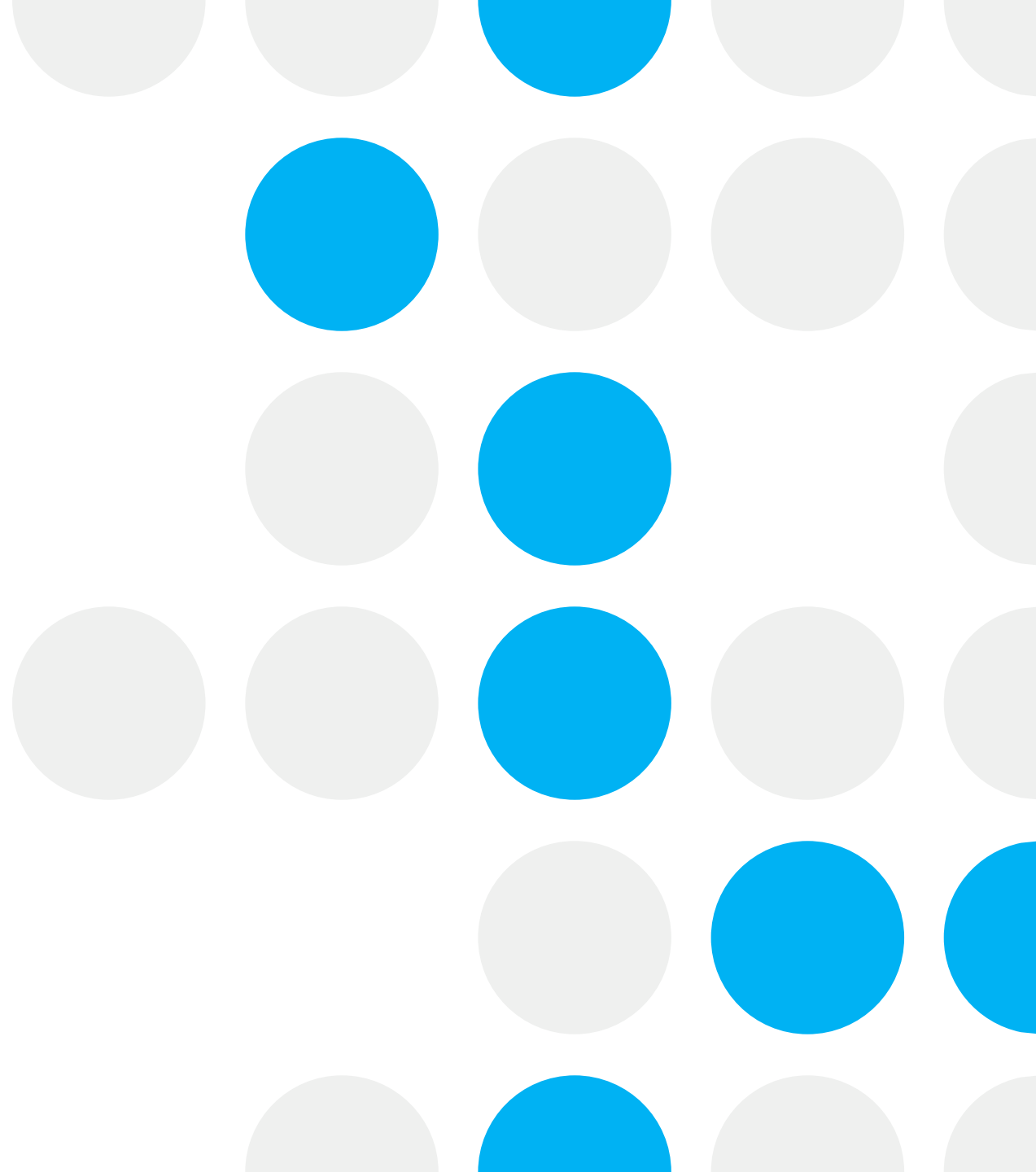
Additional Considerations / Next Steps

Thank You



ADDENDUM

**Post-Meeting: Recurring Themes,
Questions, and Comments**



ESR Stabilization Discussion



Post-Meeting: Recurring Themes, Questions, and Comments

Reporting

- There is a need for ledger reviewer that existed with IFIS. Is there any time frame to build this?

Access

- Suggestion to have report access based on report/dashboard need or by task need rather than role as roles vary so much between units. Another suggestion to have a series of nested access.
- Feedback from buyer and transaction report viewer: It should be clear and easy to find what tools and reports are available and what they do / display. People outside of the IPPS dept. should be able to figure out what they need to do their jobs without diving deep into blink or having an extensive back and forth via a SNOW ticket.
- Can we automatically eliminate Oracle & Concur roles for separated employees? Removing access is extremely difficult.
 - Per SMEs: On termed employees and de-provisioning access, we are looking into ways we can connect HR personnel actions to access management/identity management tools for some of these automations.

Other

- Training feels more focused on how to understand the different system errors rather than how the work should be completed with the tools.