UC San Diego
ELECTRONIC RESEARCH ADMINISTRATION PROGRAM

Reporting & Analytics Services

Lead Analyst/PM: Marisol Christinson
ERAP Director: Jason DeFay
Committee Chair: Patty Camacho

Team Members:
- Reporting & Analytics Committee
- Core Development Team

Purpose:

Improve the availability of valid and stable sponsored research proposal and award administration data in order to

- ✓ Deliver quality reports to campus consumers
- ✓ Allow campus users to produced ad-hoc reports

Objectives:

- ✓ Provide access to research administration data to approved UC San Diego users, while ensuring appropriate limitations to sensitive data
- ✓ Build an extensible and sustainable BI solution for research administration data
- ✓ Provide transformed and validated data that is well documented
- ✓ Provide data that allows end users to accurately answer business questions
- ✓ Provide a single, authoritative source for Contract & Grant data

Methodologies & Tools:

Software Development Life Cycle

Requirement Analysis → Design → Development → Testing → Deployment → Track, Monitor & Evolve
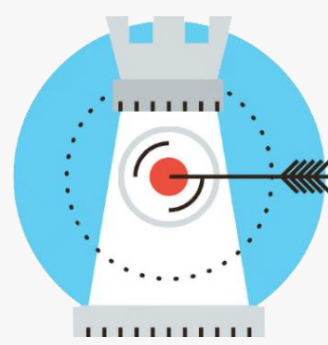
Mix of Waterfall & Agile

Projects are sequential & need detailed planning
Projects have repeatable components
Scope changes require Committee approval

Iterative approach to project deliverables
Team has creative freedom in output design
Scrums used for team engagement/collaboration

Team Tactics

- ❖ Strive for continuous improvement
- ❖ Communicate project status updates regularly
- ❖ Use an iterative/phased approach to project deliverables
- ❖ Document work for reuse and reference in the future
- ❖ Use best practices from multiple methodologies to improve projects (PMBOK, BABOK, ADKAR Change Management Model, Six Sigma, Jira)

Business Intelligence & Project Management Strategy for Success

DATA DISCOVERY & TRANSFORMATION
Through the analysis of tables and data relationships in the source systems, the Reporting & Analytics team works to transform data into coherent and meaningful structures that are ready for use by report developers

DATA VALIDATION & TESTING
Through extensive validation and testing of data brought into the reporting environment, the Reporting & Analytics team is helping ensure that all data in scope meets high quality standards and becomes the authoritative source of data for consumers and developers

DATA DEFINITIONS
By providing definitions vetted by the Reporting & Analytics Committee, the Reporting & Analytics team helps steer campus consumers to share consistent and accurate interpretations of all data fields in the reporting environment.

ERAP REPORTING AND ANALYTICS

EXECUTIVE SPONSORSHIP
With departmental and sponsored project office representation, the members of the Reporting & Analytics Committee are responsible for ensuring the vision, governance, and benefits of ERAP's Reporting & Analytics Services are successfully implemented

CHARTER
By formally outlining the business needs, goals and scope, this document empowers the Reporting & Analytics team to utilize resources to meet project objectives

DATA OWNER
By establishing a data owner for each system in scope, efficiencies in data management arise because the Reporting & Analytics team can look to a single authoritative source to aid in decision making for the administration and access of system data

DATA ACCESS & SECURITY GUIDELINES
By having an established data owner, the Reporting & Analytics team has been able to set up access rules for the data fields it manages. These guidelines help establish a baseline for all data consumers on what is appropriate use and help mitigate the risks of data being used inappropriately.

BENEFITS/OUTCOMES

- Extensible & Scalable BI Solution
- Validated & Well Documented Data
- Self Service Reporting Capabilities for Ad-hoc Report Creation
- Single, Authoritative Source of Data
- Standard Enterprise Reports & Dashboard
- Established Data Ownership & Governance of System Data