BI Release Notes

Amit Sardesai - 2024-12-09 - Business Intelligence

In-progress work

- Developing the Faculty Summary prototype
- Automating the data source for the Faculty Summary prototype
- Automating the Award Funding Type in Snowflake
- Developing the SOM Stats dashboard
- Developing the division view page of the ATR dashboard

Release notes

12/09/2024:

Features:

- Add MCVP position FTE KPI to the Faculty dashboard

12/05/2024:

Features:

- Increase efficiency of the Staff dashboard
    - Reduced the number of containers on the individual dashboard pages
    - Changed the data source from a live connection to an extract
    - Removed unused fields from the extract

11/26/2024:

Features:

- Research dashboard
    - Affected the date range toggle on the KPIs.

11/08/2024:

Features:

- Staff dashboard
    - Staff organization hierarchy updated in data source to present a cleaner lest of departments in the dashboard.

10/23/2024:

Features:

- ATR dashboard
    - Updated Blue Ridge Rank with logic to show the school ranking when 'All' or more than one department is selected and the department rank when one department is selected.
- ATR details
    - Updated the Expenditure deatail page by adding the grant index, index PI name,index PI home,index PI division, and index PI finance organization.
    - Created a NIH passthrough page

10/15/2024:

Features:

- Increase efficiency of the Faculty dashboard
    - Reduced the number of containers on the individual dashboard pages
    - Changed the data source from a live connection to an extract
    - Removed unused fields from the extract
- Increase efficiency of the Research dashboard
    - Reduced the number of containers on the individual dashboard pages
    - Changed the data source from a live connection to an extract
    - Removed unused fields from the extract

09/06/2024:

Features:

- Faculty dashboard migrated to production
    - Added faculty names to the detail pages
- Staff dashboard migrated to production
    - Added staff names to the detail pages
- Research dashboard migrated to production
    - Transitioned the dashboard to one data source

08/26/2024:

Features:

- Increase efficiency of the ATR dashboard
    - Created data source filters to reduce the amount of data coming into the dashboard
    - Reduced the number of containers on the individual dashboard pages
    - Changed the data source from a live connection to an extract

- Removed unused fields from the extract
- Transitioned the dashboard to one data source
- Incorporated the stakeholders definitions into the tool tips (hover over windows)

08/08/2024:
Features:

- Staff dashboard migrated to production
  - Detail pages moved to a separate dashboard file to improve dashboard efficiency
- Faculty dashboard migrated to production
  - Detail pages moved to a separate dashboard file to improve dashboard efficiency

07/26/2024:
Features:

- Updated the footnote on any relevant dashboard pages to indicate 'School of Public Health'

07/18/2024:
Features:

- Migrated updates to the Staff dashboard and detail dashboard pages to production.

- ATR dashboard migrated to production
  - Summary page
    - Updated the Blue Ridge ranking to always show the latest ranked year
  - Space and Research Salary Coverage
    - Updated the conditional formating of the Faculty Salary Coverage table
- Updated the default filter selections for the ATR and Research dashboards.
- Faculty dashboard migrated to production
  - Automated the Affiliate data by connecting the dashboard to data in Snowflake
  - Added Employee Class filter the the Affiliate dashboard page
  - Created Affiliate print preview and detail pages

06/11/2024:
Features:

- ATR dashboard migrated to production:
  - Summary page

- - - Move the Sponsored Salary Coverage KPI to the Space & Research Salary Coverage Page
    - Move the Wet Lab Dollars KPI to the Space & Research Salary Coverage Page
    - Create a new Success Rate KPI (3 year rolling average)
    - Updated Blue Ridge Ranking to show going down and a positive move with green text and and upward facing triangle and going up with red font and a downward facing triangle.
  - Details pages
    - Remove success rate visual
    - Changed 3 yr bar graphs to side by side SOM and DEPT graphs
    - Removed Average Federal Budget Request
    - Split 'Detail' page into two pages: 'Awards & Proposals' and 'Space & Research Salary Coverage'
  - NIH page
    - Replaced Passthrough KPI with Training T/F/K KPI
    - Added Passthrough chart
    - Grouped Award Funding Types and add and 'Other' category
- Research dashboard
  - Expenditures
    - Show expenditures related to grant indexes within index level (or sub account) PIs
    - Separated the detail dashboard pages into a separate file to improve the efficency of the dashboard.

05/24/2024:
Features:

- Staff dashboard migrated to production
- Faculty dashboard
  - increased the font size within the body of the dashboard
- ATR dashboard
  - added print preview pages
  - added detail pages

04/25/2024:
Features

- DevOps dashboard UI updates migrated to production

04/12/2024:

Features

- ATR dashboard migrated to production

4/11/2024:
Features

- Faculty dashboard updates
    - Added 'FYTD' notation to the Turnover Rate KPI on the Transitions page
    - Updated the density calculation and added a footnote.

- Research dashboard updates
    - Updated the School of Population Health toggle
    - Removed the legend from the Expenditure by Sponsor Type and added the labels to the pie chart on the Expenditures page
    - Added the total dollars to the center of the pie chart on the Expenditures page
    - Changed the Success Rate by Sponsor Type to a table on the Proposals page

2/23/2024:
Features:

- Research dashboard updates
    - Added '0' as default for KPIs when appropriate
    - Removed duplicate start and end dates on the Active Awards detail page

2/15/2024:
Features:

- Faculty dashboard migrated to production
    - Updated the dynamic turnover rate calculation
    - Changed Department chart to Turnover Rate by department chart on the Faculty Transitions page.
    - Added FY filter to the Turnover Rate by Department chart

2/6/2024:
Features:

- Research dashboard migrated to production
    - Changed the 'Date Range' filter to 'Include Current FY?' yes/no
    - Narrowed the width of all tables for easier reading
    - Adjusted the y-axis of the Effective Indirect Cost Rate chart to not start at 0%

to better show the changes

- Added FYTD in charts, KPIs, and tables
- Excluded Industry from the Success Rate calculations
- Added a doughnut chart to look at Success Rate by sponsor types to the Proposal page

10/31/2023:

Features:

- Faculty dashboard updates migrated to production
  - Updated user interface for UI consistency.
  - Updated data calculations to improve user comprehension and navigation
  - Definitions added to the KPI hovertext
  - Created and linked new User Guide to dashboard
  - Added details pages to display full data behind the graphs and tables

8/25/2023:

Features:

- Faculty dashboard with SoPH filter migrated to production

  - SoPH gives option to the user to filter the departments that were moved from School of Medicine to School of Population Health

8/24/2023:

Features:

- Faculty dashboard with SoPH filter migrated to test

  - SoPH gives option to the user to filter the departments that were moved from School of Medicine to School of Population Health

8/22/2023:

Features:

- Research dashboard with new UI migrated to test environment

  - Updated Research dashboard to have Summary dashboard page and 4 dashboard pages (Historic Awards, Active Awards, Expenditures and Proposals) with tabs at the top

  - Included option to print any dashboard page to pdf/powerpoint

  - Added the display of filters selected at bottom of page restricted to 3 values. Anything more than 3 will have 'more' label at the end

7/24/2023:

Features:

- Expenditures/Proposal dashboard changes migrated to production environment

    - Sponsor Type radiobutton expenditure dashboard has the option to pick Direct Sponsor or Origination Sponsor

    - Proposal dashboard page is updated with school hierarchy for Fiscally Managing Unit to use AM# crosswalk from the proposal dataset and master organization hierarchy

7/11/2023:

Features:

- Historical Awards dashboard changes migrated to production environment

    - Based on the corrected sponsor and originating sponsor type groupings (8 categories)

    - AM# crosswalk between the historical awards dataset and master org hierarchy

7/6/2023:

Bug fixes:

- Faculty dashboard in production

    - MCVP data is corrected for latest month

6/30/2023:

Features:

- Active Awards dashboard changes migrated to production environment

    - Based on AM# crosswalk changes between master organization hierarchy and active awards dataset.

6/29/2023:

Features:

- Expenditures and Proposals dashboard to production

    - For proposals, Currently, we only have schoolbannercode and departmentbannercode and are still awaiting the AM# addition to proposal dataset. Therefore, currently, we are doing the data load based on schoolbannercode and departmentbannercode.

    - For expenditures, we don't have sponsor type and originating sponsor type

included on the dashboard since there are data mismatches in the award number between awards and expenditures dataset which will drop records. We will highlight the differences by next week and we can make a decision how to resolve the mismatch. Based on that, we will update the expenditures dashboard in next iteration.