# Servicing the Service: Harnessing your institution's business data
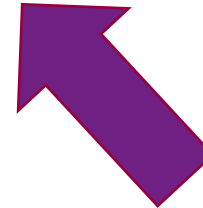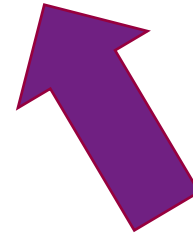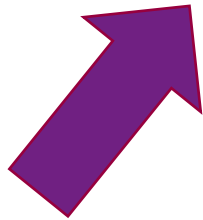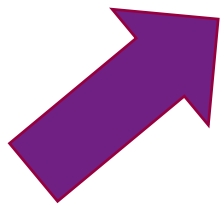
Oliver Parkes

# UK Data Service

# Why we've undertaken the review

- Multiple reports to multiple funders.
- What data is available?
- Increased demand.
- (Hopefully) improve service delivery

# What we found

# What we found - continued

- Difficult to access:
  - Scattered across multiple systems across multiple organisations (~11 systems).
  - Reports run slowly.
  - Domain knowledge needed.
  - Poorly presented.

- Messy:
  - Not always standardised across organisations.
  - Sometimes collected without use in mind.
  - Additional requirements tacked on.

# Work we've undertaken

- Activity reporting.
- Business dashboard.

# Why

- Improve accessibility:
  - Less systems to navigate.
  - Improved performance.
  - More user friendly.
- Standardisation across the Service.

# Activity reporting – context

- Activities from all partner organisations.
- Was collected quarterly via spreadsheets.
- Admin intensive – had to merge multiple copies into one.
- Difficult to analyse/use – quarterly master spreadsheets.
- Many incomplete fields.
- Key report for Researchfish reporting (ESRC).

# Activity reporting – changes

- SharePoint list:
    - No more version juggling.
    - Better interoperability with other software.

- Microsoft Form:
    - Mandatory questions.
    - More information about difficult questions.
    - Optional branches.

- Power Automate:
    - Form responses automatically saved in SharePoint.

# Activity reporting – lessons and successes

Successes:
- Reduced workload:
  - Has made collection easier across the Service.
  - Has made reporting easier.
- Accessibility:
  - Single source and location.

Lessons:
- Make use of the tools available.
- Simple solutions are the best.

# Business dashboard – context

- Report different things to multiple funders (~6 reports):
  - Take time to produce.

- Greater use by staff:
  - Credentials requested.
  - Changes to user types.

- Barriers to entry:
  - Spread across multiple systems.
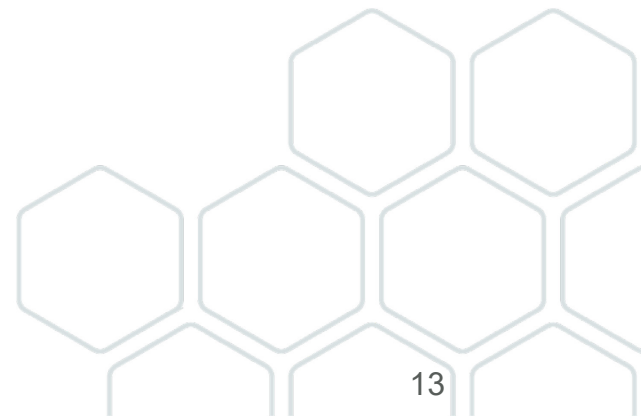  - Not well documented.
  - Slow to run.

# Business dashboard – development
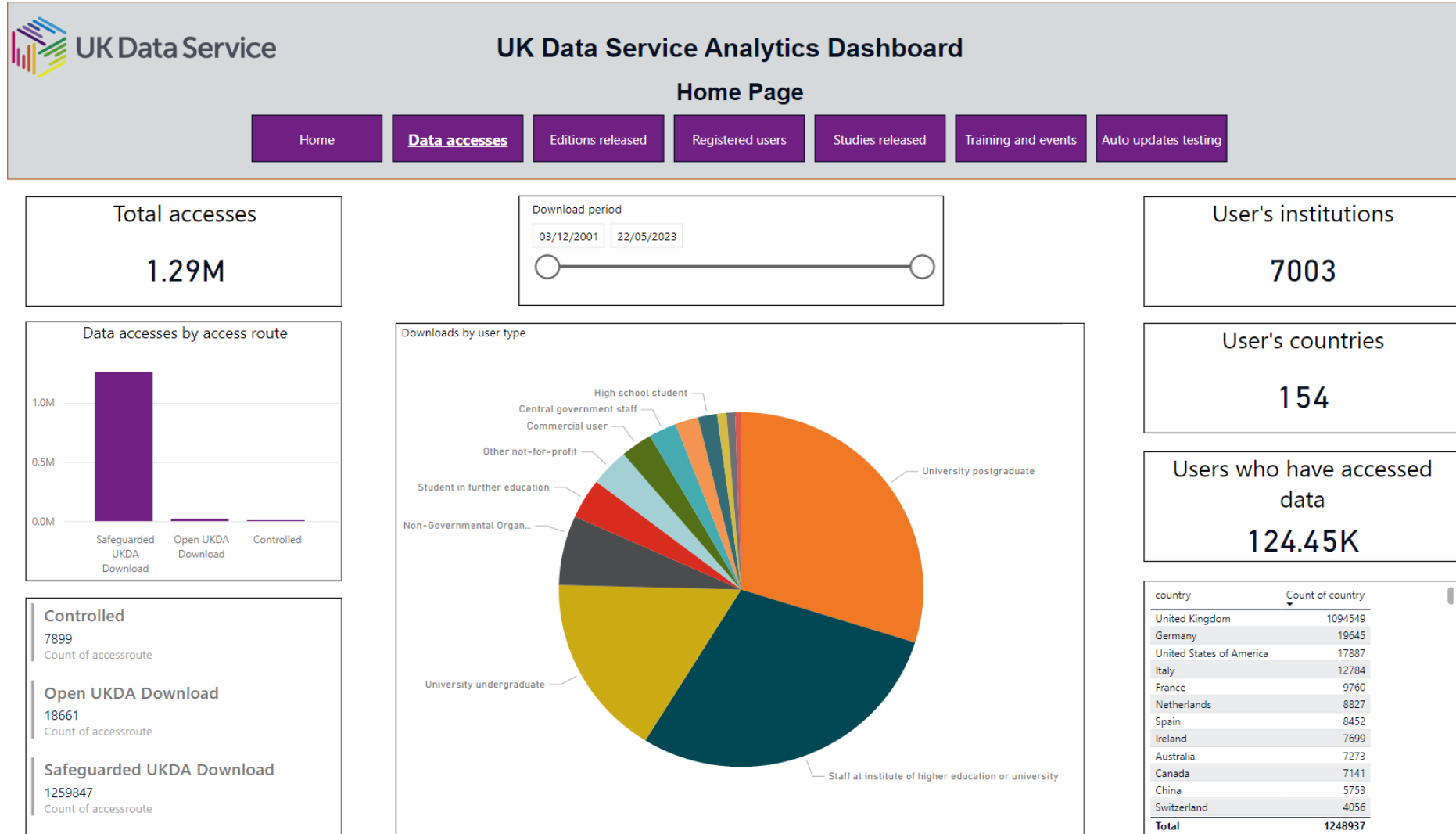
# Business dashboard – lessons and next steps

- Lessons:
  - Longer for infrastructure building.
  - Cut your losses quicker.
  - Test, test, test.
- Next steps:
  - Bringing in additional data sources.
  - Improving the functionality of the tool.
  - Taking on feedback.

# Any questions?

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# Thank you.

Oliver Parkes, oparke@essex.ac.uk