Servicing the Service: Harnessing your institution’s business data

Oliver Parkes
UK Data Service

[Logos of Jisc, The University of Manchester, UK Data Archive, UCL, and EDINA]
Why we’ve undertaken the review

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

DATA ARE EQUAL
BUT SOME ARE
MORE EQUAL THAN OTHERS

DATA DATA
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?
Thank you.

Oliver Parkes, oparke@essex.ac.uk