Faculty Workload Reporting in a Business Intelligence Environment

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Some Background:

SIMS/CUPS
- Limited available reports.
- Reporting formats were not user-friendly.

CUNYfirst-Faculty Workload
- FWL data were available through PS queries.
- Monthly Excel files of summary and detail data from CUNYfirst provided by OIRA.
- OIRA provided additional error reports 3-4 times per term.
- Labor intensive process.
Going Forward:

Business Intelligence (BI)-Faculty Workload

- Daily updates provided automatically.
- Expands available reports.
- All data in CUNYfirst is incorporated.
BI-FWL Development Process:

Initial Requirements
- Reproduce what we had, and that people were used to.
- Structure additional information to provide multi-term views and/or trends.

Data-related Issues
- Create dimensional structures that work with multiple terms.
- Transform CUNYfirst FWL data to fit the new data model.
- Data are made accessible to the BI front end.

Reporting Requirements and Issues
- Design reports and dashboards to display data.
- Ensure reports focused on usability and accuracy.
- Incorporate multi-term data in reports, where appropriate.
BI-FWL QA Process:

- Reports and dashboards were presented to and reviewed by FWL coordinators and Central HR.
- Based on feedback revisions were made to the reports, dashboards, and menus.
How does BI-FWL work?

Security Issues

• Who has access/How to provide access?
• College has access to work for faculty appointed to, or teaching at, their college.
• Reports and dashboards are available from anywhere through a standard web browser with secure logon.

Logging into BI-FWL

• Table of Contents.
• General FWL Reports, including individual and summary reports.
• Trend Analyses for Individual Faculty.
• Reports for making corrections and edits to the workload data.
  ▪ Errors and issues can be identified as they occur.
  ▪ Changes to FWL can be made directly in CUNYfirst on a continuous basis.
  ▪ Data are refreshed daily so there is quick feedback on the accuracy of the changes.
• Reports on adjunct faculty.
Some of the FWL Reports Available in BI:

- **Detail and Summary**
- **Individual Faculty Summary**
- **Assignments to Inactive Faculty**
  - This report can help identify possible errors in FWL data (e.g., workload assigned to wrong employee record), which can then be easily corrected.
  - This report is being revised to make it more user-friendly and add additional information (e.g., course information).
Some of the FWL Reports Available in BI (cont.):

- **Full-time Faculty with No Workload**
  - Identify faculty who should have workload, but don’t.
- **Employee Record Issue Report**
  - The wrong employee record is being used in CF (for a variety of reasons, including inactive records).
- **Adjunct Faculty With High Workload**
  - Important to know who these faculty are because of personnel issues relating to benefits, etc.
The Analysis Tool:

- Users can produce their own reports/dashboards/data extracts.
- Reports/dashboards can automatically be distributed via email on a scheduled basis.
- Reports/dashboards also can be shared with other users (based on their permissions).
- All reports/dashboards are available anywhere via Internet.
- Some benefits of the Analysis Tool:
  - User generated reports are also refreshed daily.
  - Don’t have to re-invent the wheel since reports can be shared.
  - All the data is in one place.
  - Minimal manual work in creating and distributing reports.
Questions, Comments, Discussion