UF Enterprise Reporting

Reporting Types and Users

The appetite for data from operational and warehouse systems has increased dramatically over the years as more and more UF employees want to view and analyze data. Reporting technologies have struggled to meet these needs, and in some cases have fallen short. This strategy will be developed with two-fold approach; by defining the types of reporting users and their needs, and the reporting architecture that will be developed to meet those needs.

Reporting Types

There are five primary types of reporting that will be needed by the University. These are: Production Reporting, End-User Ad-Hoc Reporting, Compliance Reporting, Managed Reporting, and Analytical Reporting. All of the above reporting types will be available for web consumption.

Production Reporting - The University must be able to produce the operational reports necessary to run the University’s business. This type of reporting can be defined as the high-volume production of reports created from the PeopleSoft Operational Production System (also referred to as the PeopleSoft Production System) during batch processing. Often these reports are extremely complex and difficult to generate requiring access to multiple databases, manipulation of the data streams and complex formats. The ability to perform complex algorithms and actually update the database are both aspects of producing operational reports. Due to this complexity, creation of these reports requires the use of a complex programming tool such as COBOL, Crystal, or SQR. Additionally, Cognos will be used to produce these complex reports, some Production Reports will be complex enough to require technical resources. As a result, production reporting will generally be developed and implemented by project team technical staff and maintained on an ongoing basis by the University’s Production IT department(s).

End-User Ad-Hoc Reporting - Ad-Hoc reporting, sometimes called desktop reporting, can be defined as the ad-hoc creation of reports for small workgroups of end-users. Ad-hoc reporting can be performed through accessing the PeopleSoft Production System. However, this is not an efficient design since the PeopleSoft Production Systems are created to be transactional and mission critical. Access to this operational system by end-user groups for desktop or ad-hoc reporting could create new issues of resource contention, data access, security and management. Ad-hoc reporting against the University's PeopleSoft
Production Systems will be extremely limited. The majority of the ad-hoc reporting will be performed against either the PeopleSoft Operational Data Stores (PODS) or University's Data Warehouse using reporting / analytic tools such as Cognos.

**Compliance Reporting** – Compliance reports include the delivered production reports such as Form W-2 and other tax reports, State- or Federal-required reports, or reports for other external constituents. Compliance type reports, such as IPEDs, SUPERS, Legislative Budget Request, Student Data Course File, and other surveys may be delivered or may need to be developed by the University to ensure consistency with previous reporting practices, or because they are unique to the State. These reports will most likely be performed through accessing the PeopleSoft Operational Data Stores (PODS) or the Data Warehouse. These reports will generally be developed and implemented by project technical staff and maintained on an ongoing basis by the University’s Production IT department(s).

**Managed Reports** – These are queries / reports that will be available for consumption over the Web. They will be delivered with hot-links and drill down capabilities much like the legacy Web based reporting at the University today. These canned / prompted queries will be built upon the PODS using Cognos and will be developed and delivered by the project and IT technical staff.

**Analytical Reporting** - Analytical Reporting will be performed against our Data Warehouse (Please refer to the UF Reporting Strategy white paper for more details). This type of reporting will be used by the University's Frequent Users to perform sophisticated data analysis (slice, dice, pivot and drill-down) on data for the purposes of decision-making and high level reporting. This type of reporting will involve the use of complex OLAP and multi-dimensional products, but will be directed toward the University’s Frequent Users and not the IT department. Training for these users will be crucial for the successful use of analytical reporting capabilities.

**Users**

The UF user community can be categorized into five major groups of users for reporting. These are Developers, Executive Users, Information Analysts, Report Users, and Report Viewers.

**Developers** – Users in this group will be involved in the creation of complex end-user reports and analytics. They will also be responsible for the upkeep of reporting metadata and some security.
**Executive Users** – Users in this category will generally be executive type employees such as Deans, Chairs, or Directors. They will have access to high-level data analytics (Dashboards) and KPI’s.

**Information Analysts** - Users in this group use one or more of the PeopleSoft applications to perform their regular job duties daily. Employees in this group may also be responsible for entering large amounts of data and for its accuracy or they may use the application for heavy inquiry or complex reporting functionality. They will use the delivered reports but will need to develop ad hoc reports and queries using OLAP tools delivered with PeopleSoft and additional third party tools.

**Report Users** - Employees in this group typically use a PeopleSoft application as a part of their regular job duties. Access may be for inquiry, update or reporting. The job duties for some individuals in this group may require access to more than a single application although these are not concurrent events generally. Normal users may be employed in a primary functional office or in an end-user department or divisional office.

**Report Viewers** – Employees in this group access one or more of the PeopleSoft applications but only a few times a day or week. Use of the application is not generally considered a major job duty. They generally use the delivered PeopleSoft reports with no OLAP needs.