

UT Health San Antonio's Use of Microsoft Products to Automate, Organize, and Analyze Institutional Research Activities

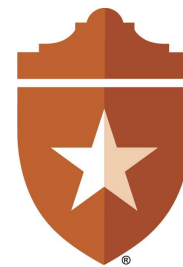
Presented by

Emily Rhodes - Database Report Writing Analyst

Gloria Salinas - Director, Office of Institutional Research

Session B5

Wednesday, March 27 3:45pm-4:30pm



UT Health
San Antonio

About UT Health San Antonio

Official Name: University of Texas Health Science Center at San Antonio



4,500 Students

2023-2024 Projected Annual Headcount



1,100 Residents & Post-Graduate Trainees

Includes Non-ACGME Accredited Residents



2,400 Faculty

Includes Adjunct Faculty



2,942,000 Patients

Includes Inpatient Days and Outpatient Visits



\$413 Million in Research

Annual Research Portfolio and Sponsored Program Activity

Primarily Health & Science related educational programs such as MD, DDS, PA, PT, OT, Biomedical Sciences, and soon, Public Health!



About the Presenters

Emily Rhodes

- BA in Music
- MS in Library Science
- 9.5 Years Registrar Experience
- 3.5 Years in Institutional Research
- Sailor and cellist



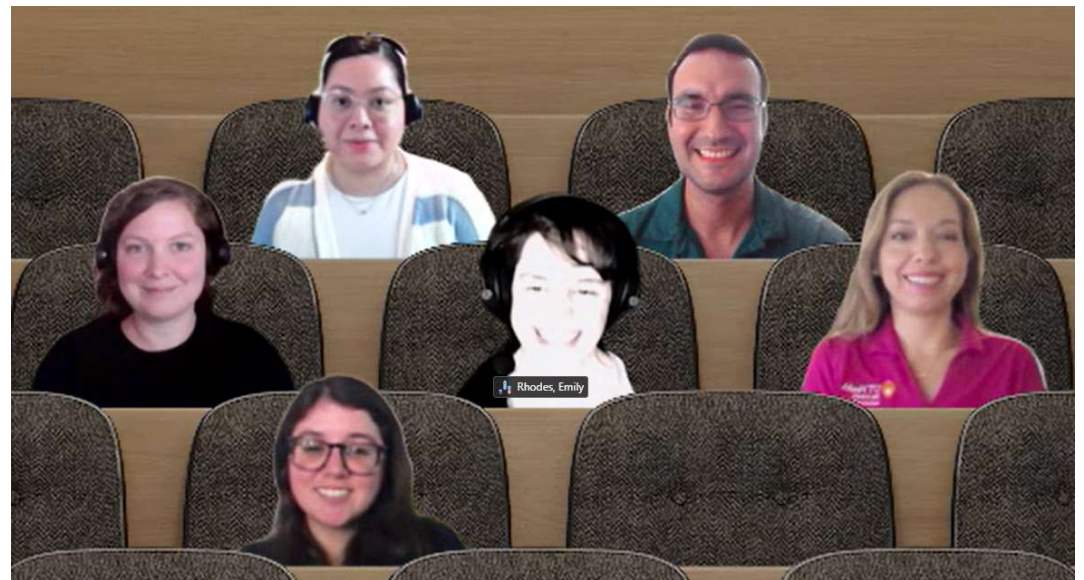
Gloria Salinas

- Bachelors in Business Admin
- Masters in Business Administration
- 13 years Financial Aid Experience, including 7 years Assistant Director of Veteran Services and Financial Aid
- 4 years Director, OIR
- 2 sons and a pet



About Office of Institutional Research

- Housed under **Division of Strategic Planning**
- **6 Employees**
 - 1 Director
 - 1 Manager
 - 4 Report Writing Analysts
- Primary Duties
 - **IPEDS, CBM**
 - **Accreditation** Reports
 - **Ad Hoc** Reports
 - Dashboards
- Tools
 - **SAS** for data manipulation
 - **Power BI** for Dashboards



Outline

Overview

Components of Data Request

- Intake & Communication (Power Apps)
- Organization & Logging
 - Data Request Log (SharePoint List)
 - Communications (Power Automate)
- Workload Analysis (Power BI)

Future Enhancements

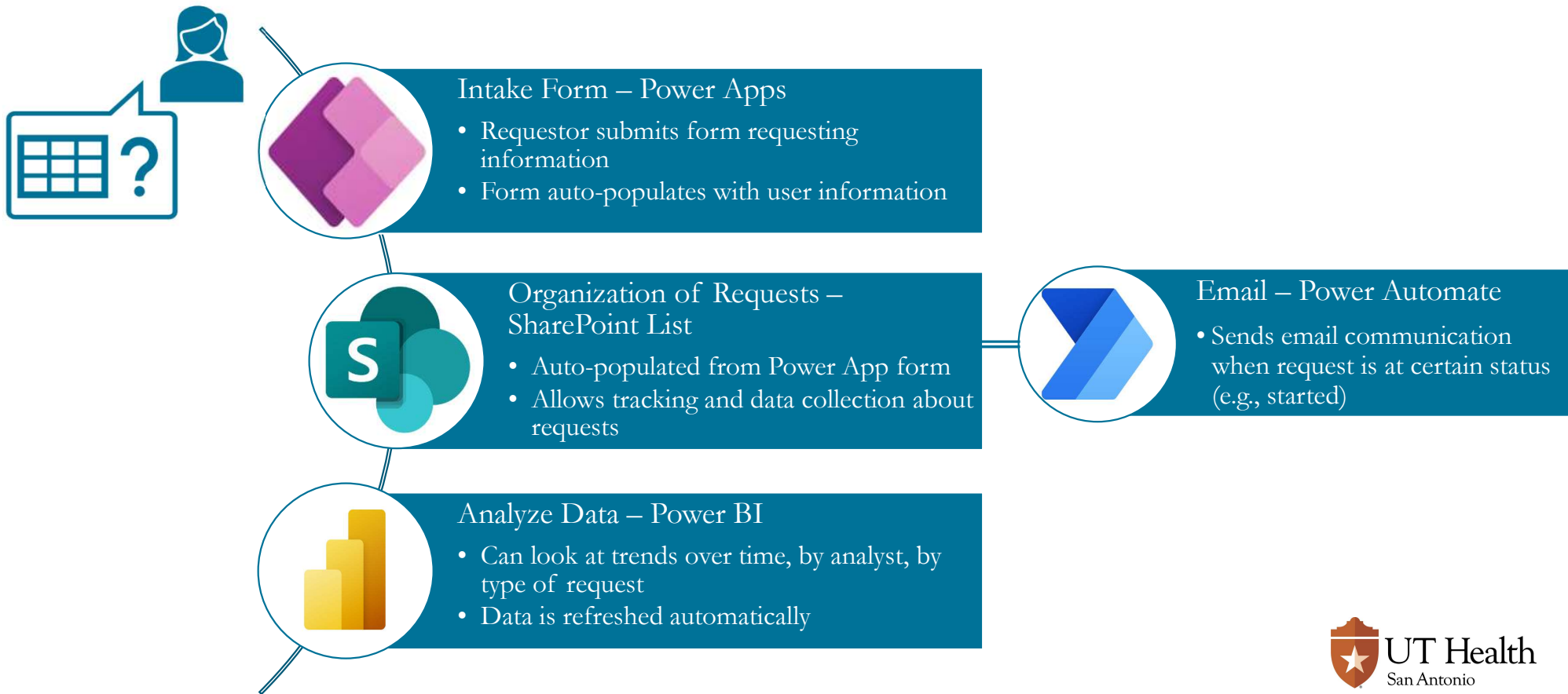
Q&A



Overview



The Parts and How They Connect



Power Apps



Auto-populates Requestor Information

Requestor Name: Rhodes, Emily | Requestor Email: RhodesE3@uthscsa.edu | Department: Ofc of Institutional Research

Ask questions that help us determine future needs or analyze metrics

Is this a recurring request? Are you going to need the data again next year, term, etc? No | For what school are you requesting the data? Non-School Request

We automatically populate a due date 1 month out

Destination of Information: SACS | Please select your preferred due date: 4/12/2024

Note: Process time depends on the nature of the requested data and the volume of requests in the queue. However, we will take your preferred date into account and inform you if additional time is needed.

We can put some custom messages as FYI

They can upload attachments

Provide as much detail as possible about the information question you are trying to answer. Please include the year(s)/Semester(s), specific groups, such as programs or demographics, of the data you need.

[Empty text input field for providing details about the information request]

If available, please attach a copy of what OIR provided in the past to fulfill your request. Do not include FERPA sensitive information.

Attachments: There is nothing attached. Attach file

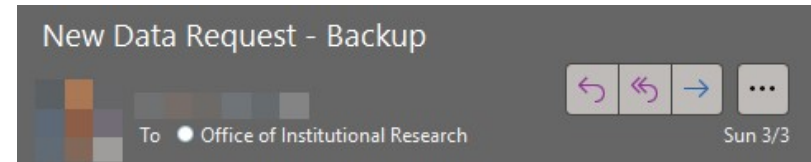
Submit

Email Communications & Power App Form

Power App Form Submitted

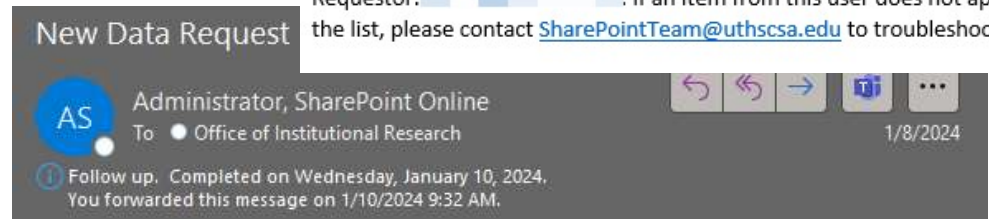


To OIR



To Requestor

Note: This email sends when any new SharePoint List item is added (even if manually) and is not in Power App setup. This could be set up in Power Automate.



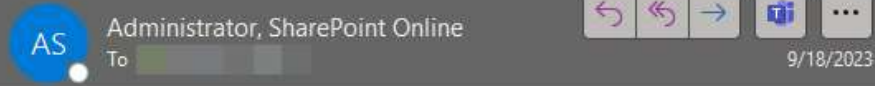
Requestor: [Redacted]
 Link to Item: <https://uthealthsa.sharepoint.com/sites/OIR/layouts/15/listform.aspx?PageType=4&ListId=5ef001da%2D63a0%2D4daa%2D9856%2Dda7260fb41dc&ID=1281&ContentTypeID=0x0100731A25C8DDB8A04F9F29B9105C5C53A3>

Response Summary:
 Requestor Name: [Redacted]
 Email: [Redacted]
 Department: Dean Nursing Sch
 Subject: Texas Annual Report Survey
 School: Nursing
 Requested Due Date: 2024-01-22
 Recurring: Yes

Description:

Good afternoon, This survey is looking at the current academic year for enrollment and the most recent graduating cohort. Questions needing to be answered are Q42-Q50. Thank you kindly! Warmest,

OIR Data Request



Your request has been received. Office of Institutional Research will contact you if additional details are needed to complete your request. If you need to edit or cancel the request, please email datarequest@uthscsa.edu.

Pros / Cons of Power Apps

Pros

- **Automatically populates user data** (name, email and department) for consistency.
- **Automatically populates SharePoint List** with data and attachments.
- **Automatically emails OIR and users** about submission.
- Drop-down values provide **consistency in data** submissions for better analysis.

Cons

- We **work with technology support** (external office) to build/fix/customize.
- It is for **internal requestors only**, since sign in is required.
- Requires that users '**give permission**' to the app (to auto-populate data), which can confuse users.
 - Note: This only happens the 1st time.
- Does not prevent **FERPA sensitive data being uploaded** by users.

What about requests from external users?

- Qualtrics form available
- Email auto sends to OIR inbox after submission
- OIR Manager manually populates data into SharePoint



Office of Institutional Research Data Request Form for EXTERNAL Users

Data Request for internal users at [My UT Health](#).

Are you requesting Student Directory Information pursuant to the Texas Public Information Act (Texas Government Code, Chapter 552)

Yes

No

Please provide the following information

First Name

Last Name

Email

Organization

Please select your requested due date:

← March 2024 →

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	1	2

SharePoint List



SharePoint List Main View

Status

Due Date

Type

Analysts Assigned

Requestor

Hours Logged



Data Request Log ☆


Status	Created	Due Date	Request Type	Data Request S...	Assigned To	Secondary A...	Reviewer_	Internal Requ...	Office/Dept	Assigned...	Secondar...	Reviewer...
Submitted, Pending Approval	Tuesday at 10:12 AM	3/22/2024	Data Request	Student Enrollment	Hawkins, Lauren M		Espinosa, Santa		Accounting Office	5.5		0.5
Waiting on reviewer	Yesterday at 10:00 AM	3/22/2024	Data Request	Waiver Comparison	Espinosa, Santa		Flores, Manuel M		Bursar Office	2.4		
Not Started	Yesterday at 2:39 PM	3/25/2024	Data Request	Spring 2024 Registration Report					Dean Graduate School			
Waiting on other department for info	December 19, 2022	3/28/2024	Data Request	SB 25 Course Sequence	Coy, Rachel Leigh		Salinas, Gloria G		Ofc of Institutional Research	4.75		
In Progress	July 16, 2023	3/29/2024	Project	Blue Ridge Dashboards Expansion - Phase 1 (SAS)	Espinosa, Santa	Rhodes, Emily	Salinas, Gloria G			135	13.87	0.75
In Progress	November 15, 2023	3/29/2024	Project	Shell Code "Blocks" (Phase 2)	Rhodes, Emily		Flores, Manuel M			13.38		
In Progress	December 13, 2023	3/29/2024	Project	Shell Code: Tabulates (Phase 2)	Espinosa, Santa		Flores, Manuel M			1		
In Progress	December 27, 2023	3/29/2024	Goal	Internal Repository - Update	Flores, Manuel M		Salinas, Gloria G		Office of Institutional Research			5
Not Started	October 26, 2023	3/29/2024	Project	Analyst Workload Detail Items Dashboard	Rhodes, Emily			Mario Flores				
Not Started	March 11	3/29/2024	CBM_IPEDS	CBM009 Report Year 2024	Hawkins, Lauren M	Flores, Manuel M	Coy, Rachel Leigh	Mario Flores				
In Progress	December 27, 2023	3/31/2024	Goal	Add Military Affiliation to both enrollment (CBM001) and graduation (CBM009) warehouse	Coy, Rachel Leigh		Flores, Manuel M		Research			

SharePoint List views can be customized. There can be multiple views.

Detailed View of Log Item

- Request Type, Name, Due Date, Status
- Analyst Assigned and Hours

 Edit all  Copy link

 @uthscsa.edu

Request Type *

Data Request

Data Request Subject *


Texas Annual Report Survey - SON

Due Date *

1/22/2024

Status *


Completed

 Assigned To

Rhodes, Emily

Assigned To Hours


4.11

 Secondary Analyst

Enter a name or email address

Secondary Analyst Hours

Enter value here

 Reviewer_

Coy, Rachel Leigh

Reviewer Hours

2.5

Detailed View of Log Item

- Comments (Shared Drive location and analyst comments) and Description
- Requestor Information
- Other information and attachments

 Internal Requestor Name

[Redacted]

 Internal Requestor Email

[Redacted]@uthscsa.edu

 Office/Dept

Dean Nursing Sch

School

Nursing

 Comments

O:\3 Annual Reports\SON Texas Annual Report Survey\2023

 Description *

Good afternoon, This survey is looking at the current academic year for enrollment and the most recent graduating cohort. Questions needing to be answered are Q42-Q50. Thank you kindly! Warmest, Beth

Recurring


Yes

Freedom of Info Request

No

Destination of Information *

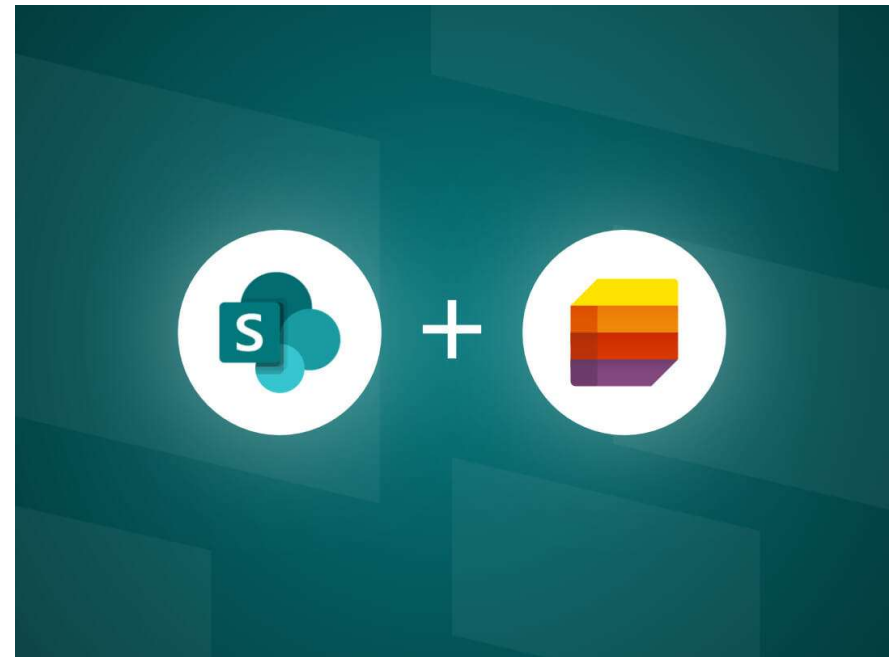
Other State Agency

 Attachments

Texas Annual Report Survey Template.pdf

SharePoint List: Pros

- **Organization**
 - It's clear who is assigned to what and in what capacity.
 - You can see upcoming pending items.
- **Transparency**
 - Everyone has access to the log via the OIR SharePoint Site and can see outstanding items.
 - Different views of the list can be made to cater to individuals or tasks.
- **Integration**
 - It integrates with Microsoft SharePoint and Power BI.
- **Data**
 - Shows the value and productivity of the office (especially with a 100% remote team).



SharePoint List: Challenges

- **Setup**

- Our list has had several iterations.
 - Example: Multiple analysts per item caused issues with tracking hours (couldn't distinguish what hours went with what individual).

- **Tracking Hours**

- Analysts track time on requests, which can be perceived as cumbersome.
- When analyzing, hour totals are based on the due date of the item, not the date/month they were done.
 - Example: If I spent all summer working on a request that was due in September, then all those hours would only show in September. This can cause issues when analyzing hours over time.

- **Maintenance**

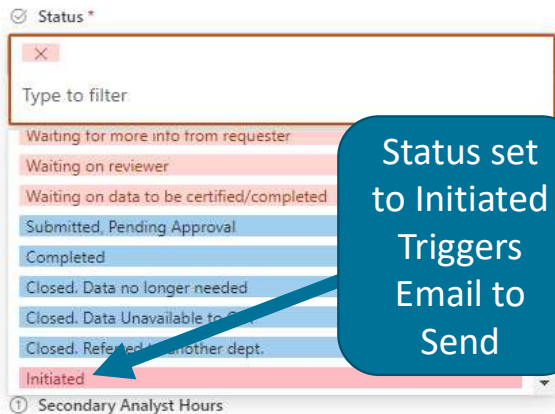
- Someone should be designated to assign analysts to tasks.
- Analyst(s) need to be trained to update the log.
- Someone designated to ensure data integrity.
 - Example: If we hand-enter a request on behalf of a requestor, do we align the department name to what would have auto-populated?

Power Automate



Email Notification – Status Update

Triggers when log item status set to 'Initiated'

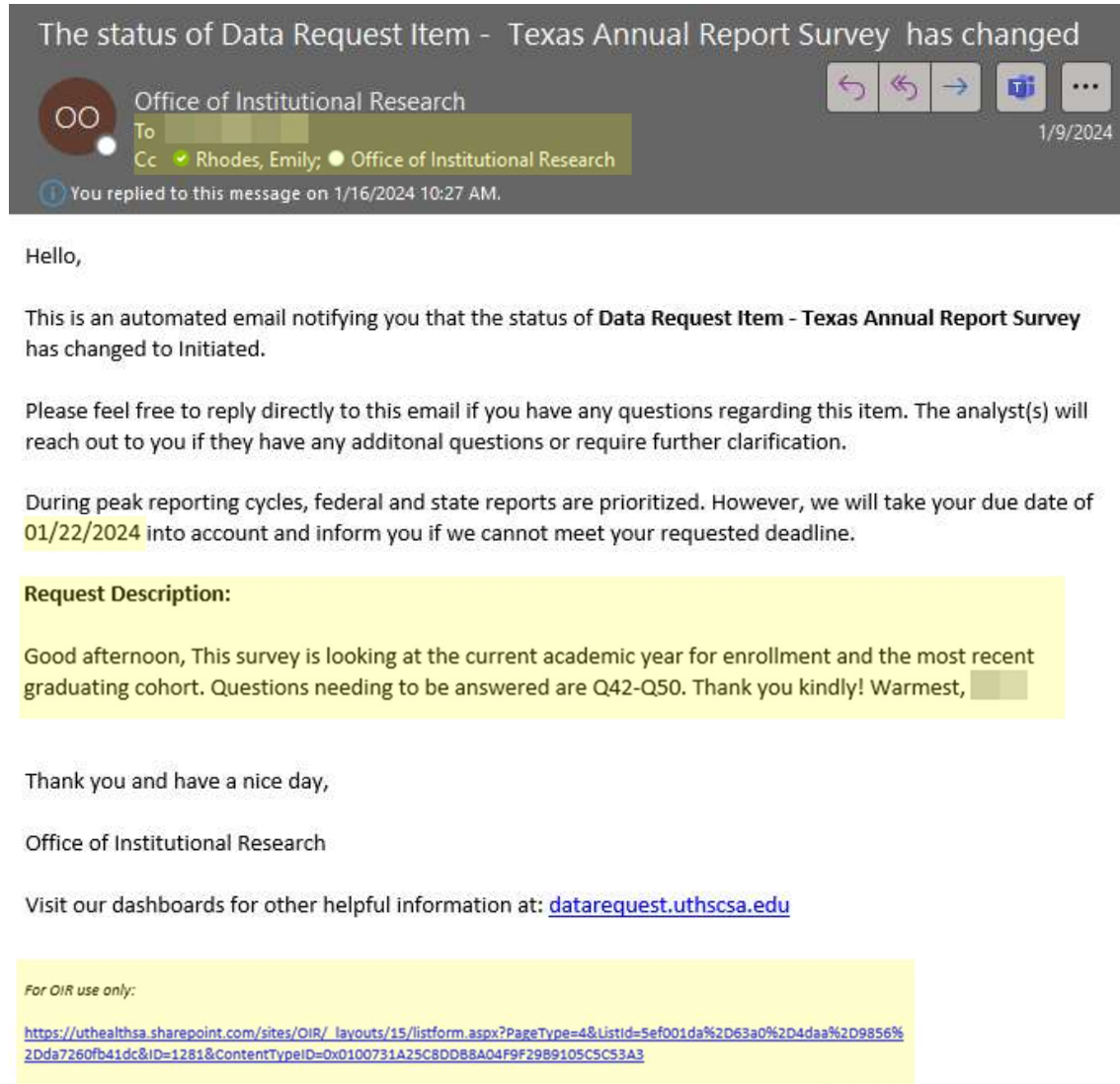


Status set to Initiated Triggers Email to Send



Sends to requestor, primary analyst, and OIR Inbox. Includes:

- Due Date
- Description
- Link to Log



Sample Power Automate Workflow

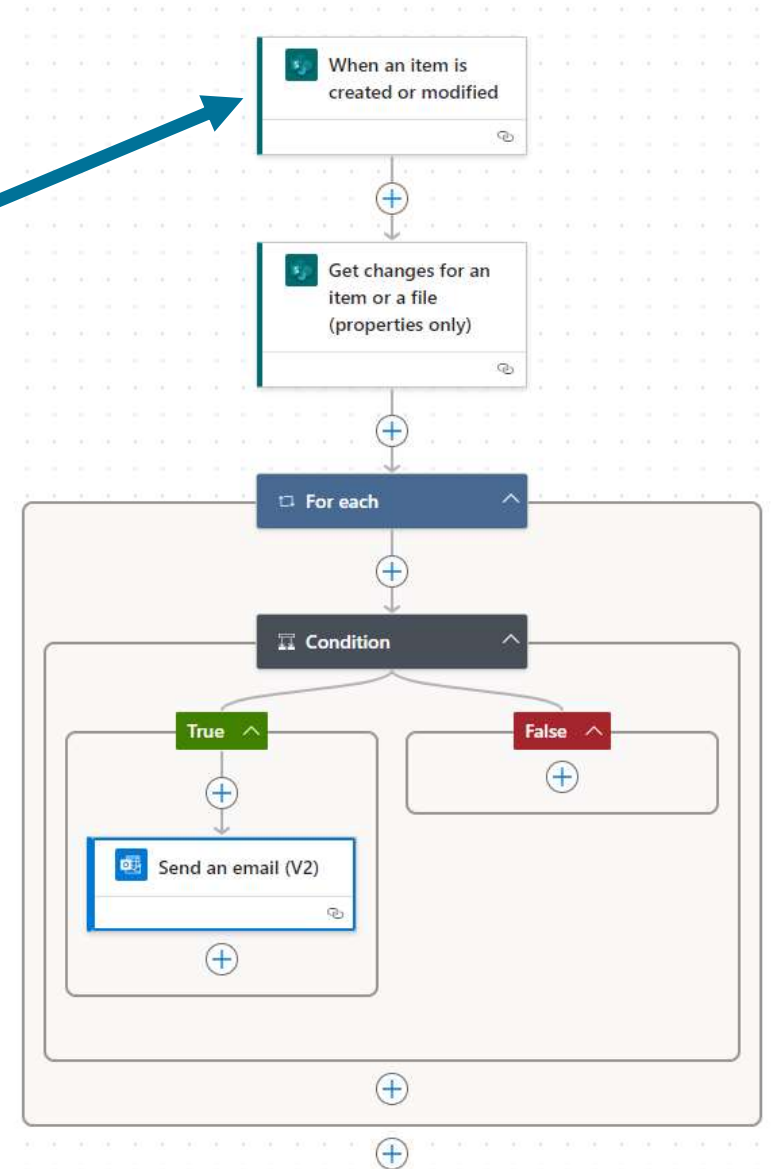
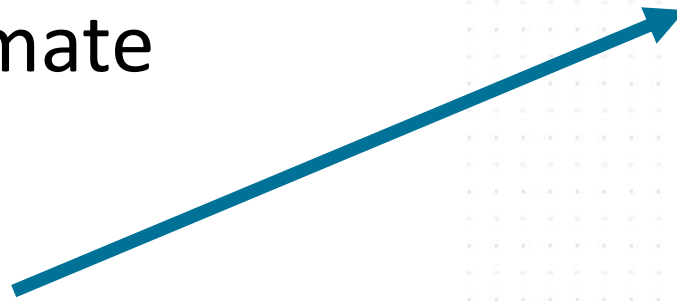
- Selects a trigger tied to the SharePoint List

When an item is created or modified

Parameters Settings Code View About

Site Address *
Office of Institutional Research - <https://uthealthsa.sharepoint.com/sites/OIR>

List Name *
Data Request Log



Sample Power Automate Workflow

- Allows me to later under 'Condition' select the condition "Has Column Changed:<Column Name> ([link to Microsoft Article about this feature](#))
- Note: You need to have enabled versioning for your SharePoint List for this to work.

Get changes for an item or a file (properties only)

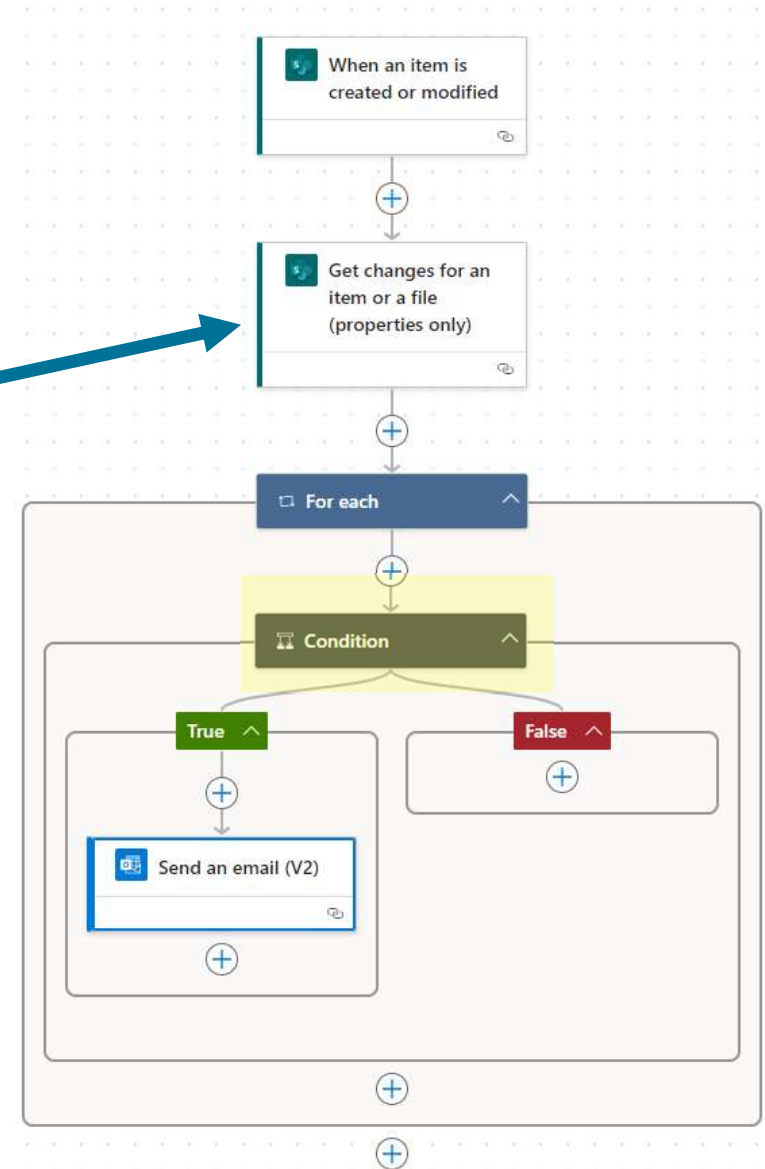
Parameters Settings Code View Testing About

Site Address *
Office of Institutional Research - https://uthealthsa.sharepoint.com/sites/OIR

List Or Library Name *
Data Request Log

Id *
ID

Since *
{Trigger...}



Sample Power Automate Workflow

- Sets the conditions when an email is sent

Condition

Parameters Settings Code View About

Condition Expression *
Provide the values to compare and select the operator to use.

AND ▾

AND ▾	<input type="checkbox"/>	Status.Va... ×	is equal to ▾	Initiated
	<input type="checkbox"/>	Column... ×	is equal to ▾	true
	+ New item ▾			

OR ▾

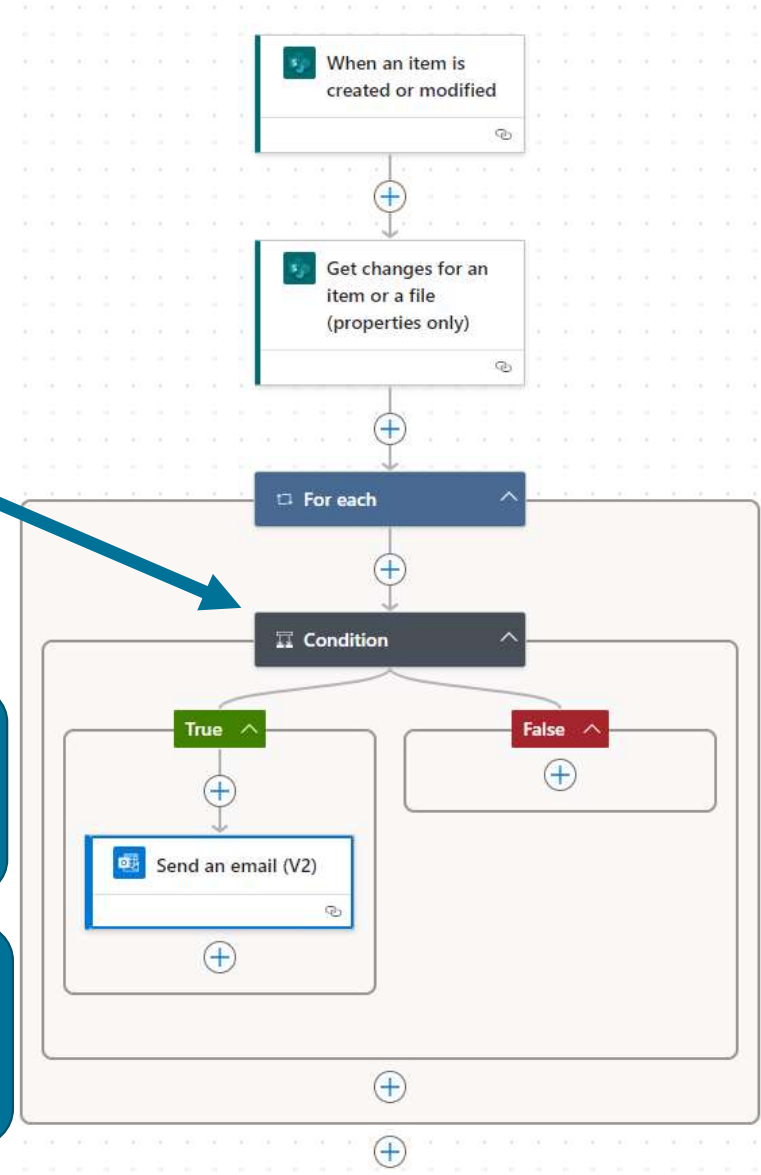
OR ▾	<input type="checkbox"/>	Request... ×	is equal to ▾	Data Request
	<input type="checkbox"/>	Request... ×	is equal to ▾	Project
	+ New item ▾			

+ New item ▾

If there is a drop-down field, then you need to select '[Field Name] Value' for it to match the label, instead of the Value property from the object.

Only when 'Status' has changed = true

Only sends out if the log item is a Project OR Data Request



Sample Power Automate Workflow

- Allows you to customize the email.
 - Note: If modifying the 'From (Send As), the person putting the email address must have "Send as" or "Send on behalf of" permissions to set the email address.

To*
body/Title

Subject*
The status of body/Reque... Item - body/Subject has changed

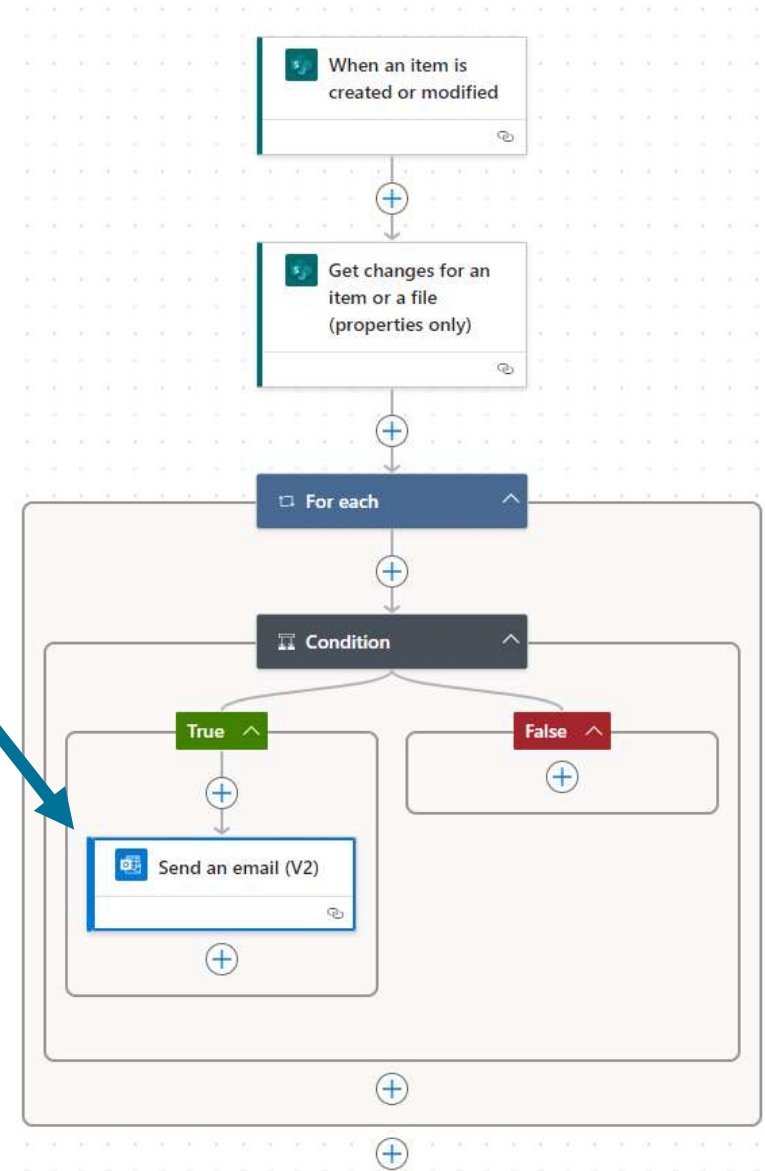
Body*
Hello,
This is an automated email notifying you that the status of body/Reque... Item - body/Subject has changed to body/Status...
Please feel free to reply directly to this email if you have any questions regarding this item. The analyst(s) will reach out to you if they have any additional questions or require further clarification.
During peak reporting cycles, federal and state reports are prioritized. However, we will take your due date of body/Date... into account and inform you if we cannot meet your requested deadline.
Request Description:
body/Descri...

Advanced parameters
Showing 2 of 7 Show all Clear all

From (Send As)
DataRequest@uthscsa.edu

We had to format the due date a bit, as it's a date-time:
`formatDateTime(triggerOutputs()?['body/Due_x0020_Date'], 'MM/dd/yyyy')`

fx Date and time functions
`formatDateTime(timestamp, format?, locale?)`
Returns a string in date format



Common Errors & Gotchas

- Setup Has an Issue
 - Test your flows to ensure they work.
 - There is a test feature when editing a flow. Manually modify an item in the list to trigger and test if it works.
- Email field has an issue.
 - Example: Instead of RhodesE3@uthscsa.edu, it has <mailto:RhodesE3@uthscsa.edu>
- The person who created the flow leaves.
 - Be sure to add co-owners.
 - Note: A co-owner has full control of the flow.

28-day run history ⓘ [Edit columns](#) [All runs](#)

Start	Duration	Status
Mar 15, 02:13 PM (1 h ago)	00:00:01	Succeeded
Mar 15, 02:13 PM (1 h ago)	964 ms	Succeeded
Mar 15, 02:09 PM (1 h ago)	597 ms	Succeeded
Mar 15, 02:08 PM (1 h ago)	00:00:01	Succeeded



Power Automate

❗ 1 of your flow(s) have failed

The flow(s) listed failed in the past week and may need your attention.

1 Notification:

Flow name	Failure count
Send Email Notification to Requester When Request Initiated v2	1

If you need more help, please visit the [Power Automate support page](#).



[Privacy Statement](#)

Microsoft Corporation, One Microsoft Way, Redmond, WA 98052



Power BI



Power BI – Trends

Review Overall Trends

- Heavy **required reporting** is September, October, February, and April (and some in July).
- **January was a slower month** for us (we also had a lot of people sick!)

Prior 12 Months

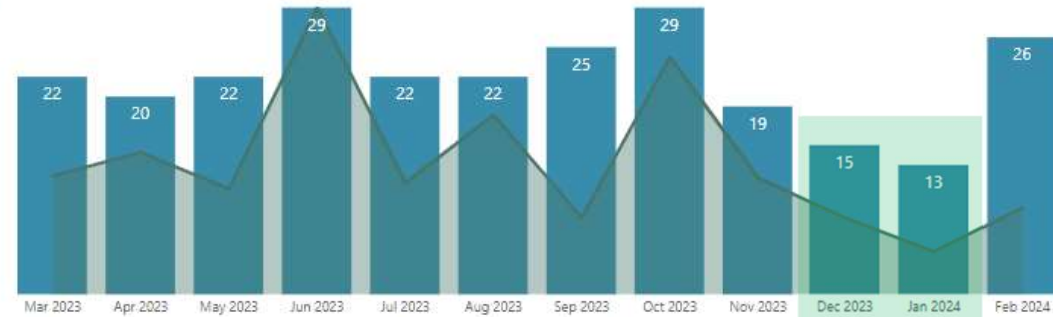
From 3/1/2023 to 2/29/2024

Requests over time help us assess upcoming volume based on past trends and summarizes cyclical peaks. It is important to note that for major reports and projects, the work typically occurs the weeks or months leading up to the due date.

Data excludes Professional Development.

Log Items and Hours

Log Items Hours



Percentage of Hours Based on Type of Request

CBM, IPEDS & Data Requests Projects, Goals & Maintenance



Power BI – Analyst Workload

Gain Insights into Distribution of Workload

- **Mario and Gloria** (Manager/Director) are primarily **reviewing items**
- **Rachel** spends more time on **CBM_IPEDS** (from the CBM001)
- **Santa** has spent more time on a **project**
- **Lauren is new** and therefore spent most of her time **training** since hire

Analyst Overview

Current Fiscal Year

From 9/1/2023 to 8/31/2024

This page helps assess productivity, collaboration, engagement, and workload at the analyst level. Consider the employee's level and tenure in your review. Includes work for the current fiscal year.

Role	Analyst - Primary		Analyst - Secondary		Reviewer		Total	
	Items	Hours	Items	Hours	Items	Hours	Items	Hours
Coy, Rachel Leigh	56	326.75	7	30.75	18	43.00	81	400.50
Espinosa, Santa	39	425.69	4	5.53	10	19.58	53	450.80
Flores, Manuel M	25	37.23	7	10.50	53	59.31	85	107.04
Hawkins, Lauren M	16	173.50	3	14.00	2	0.50	21	188.00
Rhodes, Emily	45	366.99	14	60.93	13	74.01	72	501.93
Salinas, Gloria G	24	142.65	4	8.25	33	66.91	61	217.81
*Chapa, Daniel Carlos	27	337.99	2	0.00			29	337.99
Total	232	1,810.80	41	129.96	129	263.31	232	2,204.07

Analyst	CBM_IPEDS	Data Request	Goal	Maintenance	Professional Development	Project
Coy, Rachel Leigh	28.40%	41.89%	10.11%	14.48%	5.12%	0.00%
Espinosa, Santa	14.59%	25.94%	1.77%	12.62%	5.32%	39.76%
Flores, Manuel M	16.42%	48.70%	5.61%	13.62%	13.78%	1.87%
Hawkins, Lauren M	0.00%	32.45%		1.60%	65.96%	
Rhodes, Emily	17.52%	46.61%	0.30%	6.26%	15.15%	14.15%
Salinas, Gloria G	18.55%	25.76%	4.61%	1.38%	20.32%	29.38%
*Chapa, Daniel Carlos	26.23%	64.34%		8.84%	0.59%	
Total	18.79%	41.08%	3.00%	8.93%	13.86%	14.35%

Details for all items in within the fiscal year are available [here](#).

Analyst	Top 3 Items, Excluding Professional Development	Hours
Coy, Rachel Leigh	Add Military Affiliation to both enrollment (CBM001) and graduation (CBM009) warehouse	25.00
	CBM001 Fall 2023	41.00
	CBM001 Spring 2024	34.25
Espinosa, Santa	Blue Ridge Dashboards Expansion - Phase 1 (SAS)	135.00
	CBM00R Report Year 2023	59.53
	Student Success Dashboard - Phase II	43.22
Flores, Manuel M	CBM009 Report Year 2023	11.50
	Competitive Admission Metrics - Data update	4.25
	Legislative Budget Board (LBB) Performance Measures - FY23 Actuals	5.00
Hawkins, Lauren M	LCME Annual Medical School Questionnaire Part II	20.00
	Student Life Military Affiliated Students	10.50
	Transcript Holds and Outstanding Student Financial Balances	11.00
Rhodes, Emily	2023-2024 CODA Survey of Dental Hygiene	23.24
	CBM008 Report Year 2023	50.94
	CODA Group 2 Survey	23.93
Salinas, Gloria G	Classifying Remote Site Students - Formalizing the Process	22.75
	GSBS Faculty Designation Scoping & Analysis Project	17.00
	HCM Oracle Cloud - Faculty Processes Scoping	14.00
*Chapa, Daniel Carlos	2023-2024 CODA Survey of Dental Hygiene	30.20
	CBM009 Report Year 2023	34.50
	CODA Group 2 Survey	30.05

* No longer employee of OIR

Power BI – Individual Analyst Items

Look at specific data for an individual analyst.

- View requests by total hours
- Look at 'in progress' items

Type of Request	Role	Hours	Status	Due Date	Subject
CBM_IPEDS	Analyst - Primary	50.94	✔ Completed	11/1/2023	CBM008 Report Year 2023
Professional Development	Analyst - Primary	32.16	● In Progress	3/31/2024	Emily March 2024 Professional Development
Professional Development	Analyst - Primary	29.03	✔ Completed	2/29/2024	Emily February 2024 Professional Development
Data Request	Reviewer	23.93	✔ Completed	9/8/2023	CODA Group 2 Survey
Data Request	Reviewer	23.24	✔ Completed	10/6/2023	2023-2024 CODA Survey of Dental Hygiene
Data Request	Analyst - Primary	22.52	▲ Waiting	4/1/2024	SoN - Apoyo Grant Student Data Metrics
Data Request	Analyst - Primary	22.38	✔ Completed	3/8/2024	Transcript Holds and Outstanding Student Financial Balances
Project	Analyst - Primary	19.40	✔ Completed	2/29/2024	OUR/OIR Collaboration: Creation of Workload Dashboard - Phase 1
CBM_IPEDS	Analyst - Primary	14.78	▲ Waiting	4/3/2024	IPEDS Human Resources
Data Request	Analyst - Primary	14.76	✔ Completed	3/8/2024	SoN - Sunrise Metrics for Excelencia in Education
Data Request	Analyst - Primary	13.91	✔ Completed	12/22/2023	PhD Nursing Science, THECB 10 year Program Review
Project	Analyst - Secondary	13.87	● In Progress	3/29/2024	Blue Ridge Dashboards Expansion - Phase 1 (SAS)
Project	Analyst - Primary	13.38	● In Progress	3/29/2024	Shell Code "Blocks" (Phase 2)
CBM_IPEDS	Analyst - Primary	12.69	✔ Completed	2/7/2024	IPEDS - Student Financial Aid
Data Request	Analyst - Primary	12.46	✔ Completed	12/18/2023	Nursing Supply
Data Request	Analyst - Primary	11.01	✔ Completed	2/9/2024	LSOM NTT Rank Time Request
Project	Analyst - Primary	10.26	▲ Waiting	8/31/2024	VPR Dashboards FY24 Work
Data Request	Analyst - Secondary	10.26	✔ Completed	11/9/2023	PhD program 2 charts
Data Request	Reviewer	9.66	✔ Completed	3/22/2024	LCME Annual Medical School Questionnaire Part I
CBM_IPEDS	Analyst - Secondary	9.54	✔ Completed	10/27/2023	CBM00R Report Year 2023

Power BI – The Data Model (& Power Query)

Data Request Log

- This is the SharePoint List

Status

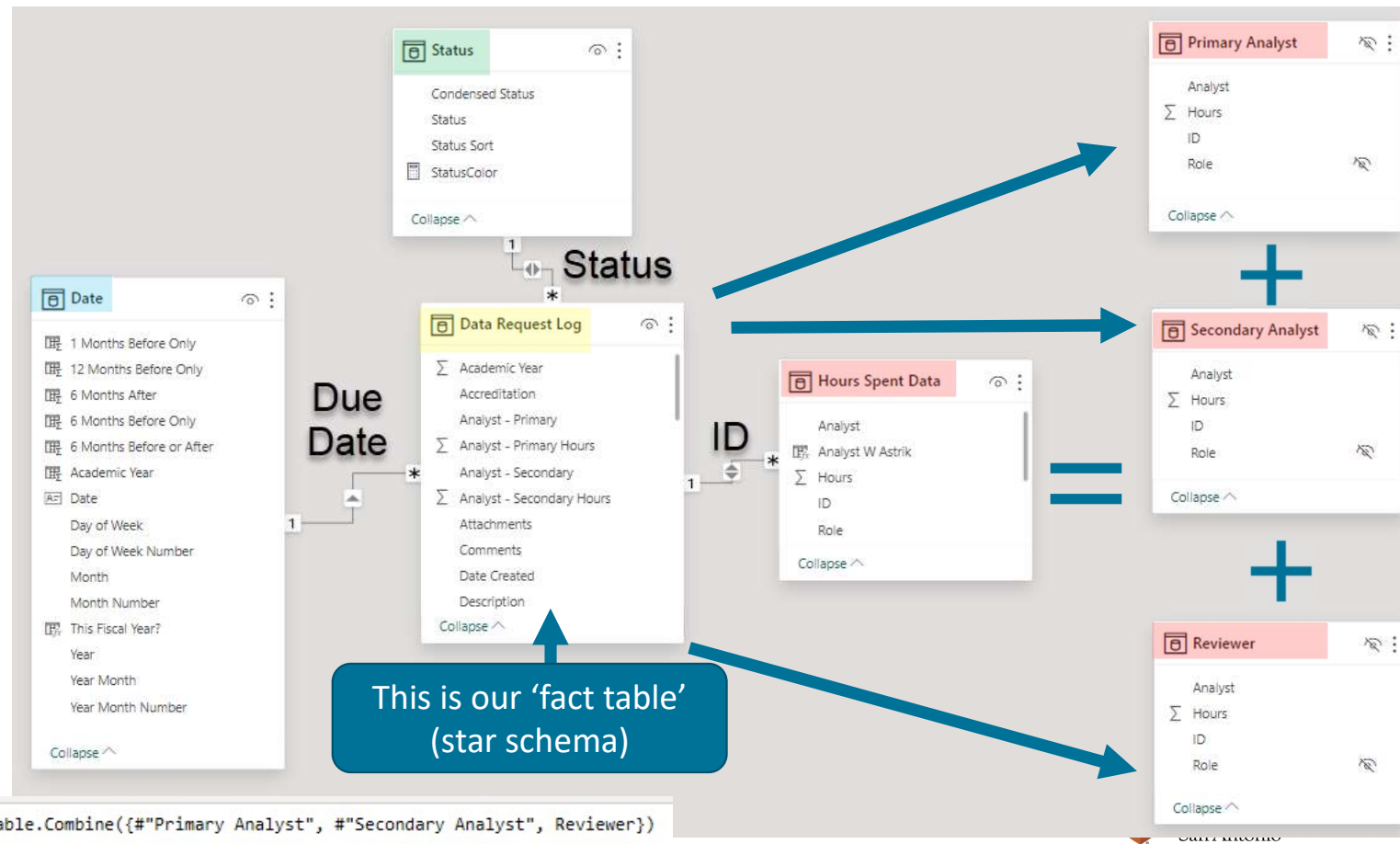
- Allows to sort the status in a specific order (Completed comes after In Progress, etc.)
- Allows for a 'Condensed' Status (e.g. 'Waiting on Reviewer' and 'Waiting on Other Department' are both 'Waiting')

Date

- Transforms the Due Date into a variety of useful values (Academic Year, short descriptions for time series, auto-filters for 6 months before/after based on today's date)

Hours and Analysts Tables

- Analyst tables are based on Data Request Log.
- Combined (union) to make Hours Spent Data



Analyst Data – From Wide to Long

- Needed a way to filter by Analyst
 - All items for a single analyst
 - Total hours for a single analyst (regardless of role)

Original

ABC 123 Analyst - Primary	1.2 Analyst	ABC 123 Analyst - Secondary	1.2 Anal	ABC 123 Reviewer	1.2 Revie
Salinas, Gloria G	1.5	Coy, Rachel Leigh	1.25		null
Salinas, Gloria G	5		null		null
Flores, Manuel M	5.3	Rhodes, Emily	1.31	Salinas, Gloria G	2

Transformed

	ABC 123 Analyst	1.2 Hours	ABC 123 ID	ABC 123 Role
941	Espinosa, Santa	8.6	1033	Analyst - Primary
942	Rhodes, Emily	3.57	1034	Analyst - Primary
943	Chapa, Daniel Carlos	6	1035	Analyst - Primary
944	No Analyst Assigned	0	1036	Analyst - Primary
945	Flores, Manuel M	6.5	1037	Analyst - Primary
946	Chapa, Daniel Carlos	12.75	1038	Analyst - Primary
947	Chapa, Daniel Carlos	7	1039	Analyst - Primary
948	Espinosa, Santa	5.3	1040	Analyst - Primary
949	Rhodes, Emily	2.16	1041	Analyst - Primary

Analyst Data – From Wide to Long

- From the Data Request Log, keep only fields needed
- Transform to an 'Analyst – Primary' only table
- Repeat with 'Analyst – Secondary' and 'Reviewer'
- Combine all the tables together

```
= Table.Combine({#"Primary Analyst", #"Secondary Analyst", Reviewer})
```

Analyst	Analyst W Astrisk	Hours	ID	Role

ABC 123	Type of Request	ABC 123	Subject	Due Date	ABC 123	Status
1	Project		Updating Student Achievement Data	11/16/2020		Completed
2	Maintenance		OIR - Load CBM009 2019 data into warehouse	5/15/2020		Completed
3	Maintenance		OIR - load CBM00R data into the warehouse	7/21/2020		Completed
4	Data Request		OIR - Create a CBM00N report to be submitted before every semester	11/11/2020		Completed
5	Project		OIR- Evaluate CBM001 Warehouse for Standardization	7/3/2020		Completed
6	Data Request		OIR CBM001 Summer 2020	11/2/2020		Completed
7	Project		OIR - 130 SCH Cap Doctoral Students & UG OVL	6/2/2020		Completed
8	Project		OIR- Review of 2020 CIP Codes	7/15/2020		Completed
9	Maintenance		OIR - Update Program Inventory	7/30/2020		Completed
10	Maintenance		OIR- Update MyUTHealth OIR Sharepoin	5/22/2020		Completed
11	Maintenance		OIR - Review Catalog Updates	7/30/2020		Completed

Query Settings

PROPERTIES

Name: Primary Analyst

APPLIED STEPS

- Source
- Removed Other Columns1
- Custom1
- Renamed Columns1
- Replaced Value

Power BI - Pros and Cons

Pros

- Automated - Can be set to auto refresh daily (or hourly/weekly)
- For Managers/Directors
 - Gain insights into workload and justify staffing need/effort
 - Help with resource planning for future projects
- For Analysts
 - Assists in monitoring performance
 - Assists in writing performance evaluations (i.e., what projects did I complete 8 months ago?)

Cons

- Only uses due date for time-series, so workload is an approximation
- Can be a steep learning curve for Power Query and Power BI
- SharePoint List set up can impact data model set up
 - Example: If a field allows for multiple values, it may require an auxiliary table with a many-to-one join on ID

Next Steps for UT Health SA



Possible Future Enhancements

Notifications

- **Update Power Automate to remove extra code** related to multiple analysts in a SharePoint field (for future sustainability/simplicity)
- Have a **notification that provides more details** to the requestor about what they submitted.
- Have a **notification** to the requestor when the request is closed for **survey feedback** (currently done manually when we send data)

Analytics

- Include **links to the log item** where applicable, in current dashboards, like this:

Name	Status	Link to Item
F		https://uthealthsa.sharepoint.com/teams/Offi...
Flores, Mander M	Completed	
Diaz, Brandy D	Completed	

- **Improve the dashboard dedicated for analysts** for reviewing their in- progress tasks and upcoming tasks, with direct links to the log

Questions?

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UT Health
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