UDW+ Administrative Metrics Dashboards and Reports

The Administrative Metrics Dashboard is the result of cross-collaborative work across the Program Services Office, NYU IT, UDW+ team, Decision Support Group and key stakeholders representing each department within Financial Operations & Treasury and Employee Services & Systems. When complete, it will include ServiceLink, PeopleLink, StudentLink, Call and Operational Metrics. Focus Groups were convened in Q1 2015 to define and prioritize the key performance metrics and reporting needs for functional process owners and executive dashboard users.

A core set of reporting priorities were defined and addressed in the first version of the Administrative Metrics Dashboard. Subsequent releases will continue to incorporate additional reporting needs and data as it becomes available in UDW+.

Version History

<table>
<thead>
<tr>
<th>Version</th>
<th>Release Date</th>
<th>Summary of Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>October 2015 (beta)</td>
<td>Release to production: Initial beta prototype of ServiceLink Dashboard with Productivity and Aging sections.</td>
</tr>
<tr>
<td>1.1</td>
<td>January 2016</td>
<td>Bug fixes and additional enhancements.</td>
</tr>
<tr>
<td>1.2</td>
<td>February 2016</td>
<td>Release to production: ServiceLink Dashboard with Productivity and Aging sections. Release to production SPA &amp; AP Operational Dashboards.</td>
</tr>
<tr>
<td>1.3</td>
<td>May 2016</td>
<td>Bug fixes and enhancements to Productivity Heat Map.</td>
</tr>
<tr>
<td>1.4</td>
<td>June 2016</td>
<td>Release to production: Quality section for ServiceLink Metrics Release to production: SPA &amp; AP Operational Metrics Dashboards.</td>
</tr>
<tr>
<td>1.5</td>
<td>July 2016</td>
<td>Release to production: Quality section for PeopleLink Metrics.</td>
</tr>
<tr>
<td>1.6</td>
<td>September 2016</td>
<td>Bug fixes and additional enhancements.</td>
</tr>
<tr>
<td>1.7</td>
<td>October 2016</td>
<td>Release to production: Timeliness section for ServiceLink Metrics</td>
</tr>
<tr>
<td>1.8</td>
<td>November 2016</td>
<td>Release to production: Productivity and Aging sections for PeopleLink Metrics.</td>
</tr>
<tr>
<td>1.9</td>
<td>December 2016</td>
<td>Release to production: Timeliness section for PeopleLink Metrics.</td>
</tr>
</tbody>
</table>

Key Prompts

To accommodate the structure of NYU’s ServiceLink model, the Administrative Metrics Dashboard organizes data by Service Tower and Assignment Group. These filters are located at the top of each page and permit the selection of any division and department available within the dashboard. Data may be viewed for multiple service towers and assignment groups at any given time.

Period

The dashboard shows information as of a particular period. The available periods include:

<table>
<thead>
<tr>
<th>Period</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>7D</td>
<td>Activity for seven days, not inclusive of the current date.</td>
</tr>
<tr>
<td>MTD</td>
<td>Month-to-date activity, not inclusive of the current date.</td>
</tr>
<tr>
<td>3M</td>
<td>Three months of activity, including the current week, not inclusive of the current date.</td>
</tr>
<tr>
<td>6M</td>
<td>Sixth months of activity, including the current month, not inclusive of the current date.</td>
</tr>
<tr>
<td>1Y</td>
<td>One year of activity, including the current month, not inclusive of the current date.</td>
</tr>
<tr>
<td>2Y</td>
<td>Two years of activity, including the current quarter, not inclusive of the current date.</td>
</tr>
</tbody>
</table>

Incidents and Requests

Datasets must be filtered to show either Incidents or Requests. Incidents and Requests are created via the intake, which is used when a ticket is created by an agent, via self-service by a client, or when a client sends an email to a ServiceLink agent. In turn, all Requests and Incidents have associated tasks.
**Incident:** The ticket about something that is not working as intended - e.g. something is broken or not working properly; Incidents are typically assigned to and owned by a tier 1 assignment group.

- **Incident Task:** A piece of work that someone does in support of fixing the problem cited in an Incident. Incident Tasks belong to an Incident (i.e. in order to have an Incident Task, you must first have an Incident); Incident tasks are typically assigned to and owned by a tier 2 (or subject matter expert) assignment group.

  **For example:**
  
  Incident: Did not get direct deposit in my account
  
  Incident Task #1: Check that Financial System is up to date with Account #’s

**Request:** A request is a bucket that contains one or more requested items.

- **Requested Item:** A ticket that is for something you don’t already have (e.g. new account) OR a question about how to do something / request for information (e.g. how do I update my payment elections).

- **Catalog Task:** A piece of work that someone does in support of addressing the question posed in the Requested Item.

**Data Sources and Update Frequency**

Data are sourced from ServiceLink, PeopleLink, Cisco, Certrax, Stars, PeopleSync, fame, eReq/SciQuest, and additional manual sources. These data are refreshed nightly, as indicated by the date/time stamp in the upper right corner of each dashboard page.

**Security**

Access to the Administrative Metrics Dashboard is currently restricted to beta users who have been provisioned UDW+ access and who have been onboarded into the beta program. To be added to the group of beta users, contact DSG (askds@nyu.edu).

**Use Notes**

**Tables reorganization.** The column order and sort order of dashboard tables can be reorganized. To rearrange columns, hover your mouse above the column to find the shaded bar. Click on the bar, drag it left or right, and drop it where shaded space appears between columns. To organize the table with sections, drop the shaded bar above the table. To re-sort items in a table column, find the arrows to the right of the column heading and choose ascending or descending sort.

**Idle.** If the dashboard stays idle for an extended period some components may not load. Log out and back in again to solve the problem.