**Consolidated Research Information**

Goal

* WSR & Intake form should be simple
* WSR should reflect:
  + risk, project health, why status changes, escalation needs, gate review schedules, sprint information, resource gap info, whether projects are on schedule or not
* PM reporting should be automated, PMs should be able to make updates easily
* Executive Dashboard should have timelines and risk levels; deployment info; resources; status; show summary view of all projects; ability to “drill down” to status report;
* Make MPL data searchable
* Include detailed instructions for filling out the WSR and Intake form
* All projects should be accessible from one location

Additional Info

* Unstructured comments sections are not helpful
* Milestones and R&I should be tied together
* Prevent race condition conflicts
* Dashboard should also have: simple visuals; commentary and categories of issues per project; green/yellow/red status; management call for action;
* Repeated information in WSR should repopulate fields
* Resources (human) could be useful on WSR
* WSR is currently tailored to stakeholders’ interests
* Competing opinion on availability of cost information
* Technical info:
  + MPL should be the core table
  + Keep Intake in separate table, can have intakes preserved and do copies
  + Database will allow shared access among several groups (possibly read only for some)
  + Three important things: data layout, front end, reporting
  + Tableau does great visuals on numbers, it doesn’t do basic reports well
  + CPM oversees all projects
  + Create different views for different types of viewers

Quotes

* “We don’t want the CFPB to be like the Winchester House” – Kevin S
* “The more detail you have when reporting, the better, [however,] more detail on the front end takes up more time.” – Bill F