

MAKING SIRI YOUR OWN

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Making SIRI Your Own

Today's presentation:

- Background
- Customizing reports to meet your needs
 - Adding/removing fields, sorting and sub-totals
 - Saving and re-using your customizations
- Department Use fields
- New security paradigm
- New and upcoming dashboards



Background

SIRI (Strategic Information Resource Initiative) went live to the campus in 2008, with basically 2 dashboards – People and Money.

Today, there are over 45 public-facing dashboards, and over 30 active unit and initiative dashboards. SIRI delivers reports and analyses to over 2,800 UB employees. Last year 700,000+ dashboard views were recorded.

Subject areas include financial, human resource, student, research, procurement, facilities, and philanthropy.

Customizations

The SIRI team has begun to add the ability to customize the reports you use. These customizations include the ability to:

- Add and remove numerous fields
- Resort the data by any field, as well as create multiple sorts in the same report
- Create sub-totals on any descriptive field in the report
- Save and re-use your customizations

Department Use Fields

One of the most frequently requested features we've been asked for is the ability for users to add their own fields to reports. Fields like internal project or initiative identifier, faculty/staff name, or purpose, for example, would allow departments to eliminate supplemental tracking systems.

Departments can now add up to 5 fields for their own usage and associate these with any State, Research Foundation, or UB Foundation account.

These Department Use fields are now available in select financial dashboards like Money and Money Management, as well as soon-to-be released Customizable Money Reports and Customizable Financial Reports dashboards.

New Security Paradigm

In the past, SIRI dashboard access was done by individual dashboard. This created considerable work and confusion with access requests for both the campus and SIRI security team.

Roles are now being utilized to reduce the amount of time and work it takes to provision access. Each role a user is assigned will provide access to numerous dashboards. A person can also have more than one role.

For example, a member of the Department Staff Financial (Operational) role will receive Account Management, Money, Money Management, Procurement, and UB Foundation Endowment dashboards.

New and Upcoming Dashboards

New:

- Travel Management

Upcoming:

- Supervisor
- Customizable Dashboards
 - Money, Financial, People, Student
- ShopBlue data



Conclusion

For more information about SIRI, visit our web site at www.buffalo.edu/siri, Here you will find:

- Instructions, tip sheets, and how-to videos
- Instructions and forms for data and dashboard security
- Contact information

Questions?

How did we/ I do?--Take the Session Survey on your smart device using the QR Code on your schedule.