

# MAKING SIRI YOUR OWN

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# Making SIRI Your Own

Today's presentation:

- Background
- Infosource & SIRI
- UB Code Updates
- Security Paradigm
- Customizing reports to meet your needs
  - Adding/removing fields, sorting and sub-totals
  - Saving and re-using your customizations



# 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.

# Infosource & SIRI

## Infosource:

The University at Buffalo has developed and continually enhanced a central data repository consisting of data sourced from:

- The campus's 3 major employers – State, Research Foundation, & UB Foundation.
- Student data – transaction level data generated in HUB.
- Data collected from vendor purchased cloud based applications; i.e. Concur, UB Jobs, & ShopBlue.

SIRI connects exclusively to Infosource for report generation.



# UB Code Updates

To coincide with the rollout of UPlan this Fall, we wanted to share that there will be coming UB Code updates that may affect data you see in SIRI.

To further improve our financial reporting we have undergone a reworking of the UB Code table, which is used to categorize expenditures.

- **A listing below is some of the dashboards that you will see updates.**

Support Tables > “UB Code” tab.

Strategic Financial Management > All tabs.

If you currently have the “UPlan Assistant” dashboard you will be able to see the new hierarchy of UB Code under the “Support Tables” tab.

# 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.

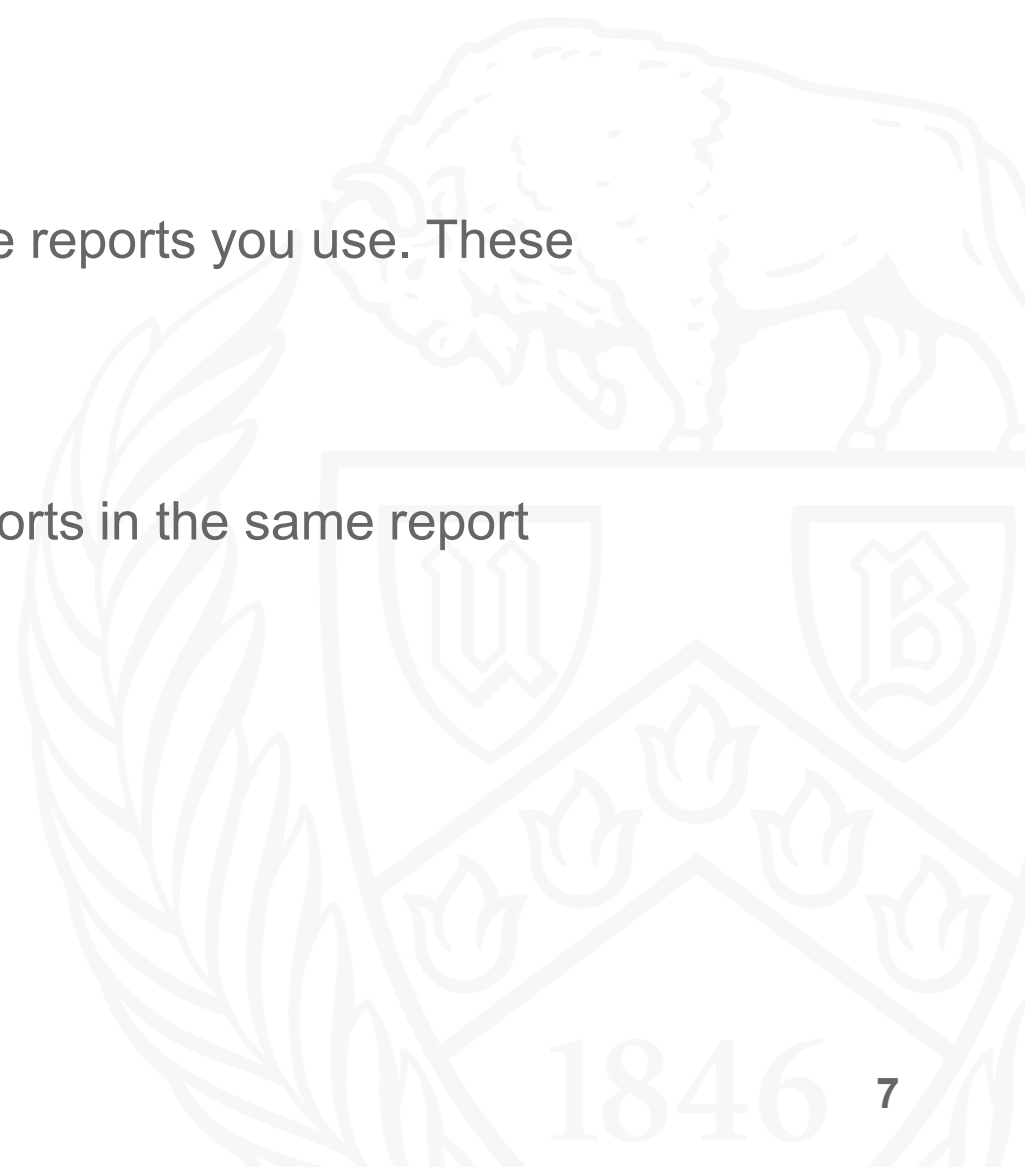
Roles are now being utilized to reduce the amount of time and work it takes to provision access. Each role a user is assigned will provide access to numerous dashboards. A person can also have more than one role.

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

# 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



## Conclusion

For more information about SIRI, visit our web site at [www.buffalo.edu/siri](http://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
  - [siri@business.buffalo.edu](mailto:siri@business.buffalo.edu)
  - 716-645-4500



## Questions?

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