

# Strategic Information Reporting Initiative (SIRI) – Campus Update

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## **University Information Challenges**

- **Fragmented Information**
  - o Multiple sources and systems for Student, Financial, HR, Research, Facilities (Space and Capital Budget), and Philanthropic information. Examples:
    - 12 financial/HR inconsistent sources and systems, plus local shadow systems
    - 5 Research sources and systems
  - o 5 Major organizations (State, RF, UBF, FSA, CPP)
  - o Different terminology
- **Data Quality**
  - o Identified 50 persistent data quality issues, plus an additional 200+ during implementation.
- **Lack of information and decision support tools**
  - o Information supporting UB2020 Planning and Budgeting process provided through Adobe PDF documents generated on an ad hoc basis
  - o University does not have an enterprise reporting solution.
  - o InfoSource provides data that mirrors data from source systems, but departments are left to find and select their own reporting tools (Excel, Access, Oracle, etc.).
  - o Pre-summarized and analyzed historical information (Data Warehouse) not available.
- **Inefficiencies**
  - o Identified significant costs from current information and reporting solutions:
    - UB2020 Resource Management Process: \$500K annually campus wide
    - Day to Day information systems: \$250K annually campus wide
    - Campus Data Mgt and Reporting (CFO survey) \$1.8M annually
    - Ad hoc reporting: \$200K annually campus wide
    - Forecast and Planning and Commitment Management solutions not available to the campus, requiring local shadow systems

## **SIRI Vision**

- **Single Authoritative Source:** Student, Research, Financial, HR, Facilities, and Philanthropy data integrated across funding sources, reliably, accurately, and consistently aggregated and integrated into one place: InfoSource
- **Single Reporting Solution:** Student, Research, Financial, HR, Facilities, and Philanthropy integrated into one analytic and reporting solution: Oracle Business Intelligence
- **Foundation for enhanced analysis and strategic decision making in the future:** Data and reporting environment + skill sets
- **Forecasting and Planning:** Forecasting and planning tools integrated with the SIRI solution and information

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## ***SIRI Approach and Update***

- **Phase I: Requirements, Business Case, Recommendation (May 2006 – October 2006)** Steering Committee and Project Team collaborated with the campus to identify University information and reporting needs, determine resource requirements and benefits, and made an information, reporting, and solution recommendation that was approved by the President, Provost, VPs, and Deans in February 2007.
  
- **Phase II: Reporting foundation and Financial and HR Resource Management implementation. (March 2007 – January 2008).**
  - o Delivered:
    - Information and Reporting infra-structure (May 2007 – August 2007):
      - Acquired and implemented Oracle Business Intelligence Enterprise Edition
      - Enhanced InfoSource by adding data warehouse functionality, and added business intelligence/reporting environment from scratch, since no pre-existing solution existed on campus. (InfoSource contains information that is detailed, organized by transactions, and focuses on serving operational needs, hence the name *Operational Data Store*. SIRI adds a *Data Warehouse* component that is more summarized, contains pre-calculated data that is integrated across organizations and subject areas, and better supports trend analysis)
      - Upgraded InfoSource hardware and database for improved performance.
  
    - Information and Reporting
      - UB2020 Resource Management: (February 2008) Deployed Resource Management reports and dashboard integrating Student, Financial, HR, Research, and Philanthropy subject areas in support of the University Planning and Budget process.
        - o Specific Improvements:
          - Web reporting interface with drill down capability to the account level for finance and the person for HR within the report. Previously delivered in Adobe PDF and a separate detail reporting tool.
          - Automates much of the process for generating Resource Management schedules and eliminates the existing Resource Management reporting system significantly reducing the \$500K annual cost.
          - Graphical as well as tabular information presentation.
          - Improved printing and performance.

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- People and Money: (December 2007) Deployed Financial and HR reports and dashboards that will eventually replace and enhance functionality found in existing systems: People and Money, BARS Campus Inquiry, and InfoSource On-line Financial and HR.
    - Specific improvements:
      - Better navigation, easier to access, improved search functionality, performance, and printing
      - Can now view multiple fiscal years back to 1994/95. Previously only current and prior year information was viewable.
      - Improved performance
  - Procurement and Inventory: (January 2008) Deployed Procurement and Inventory reports and dashboard.
    - Specific improvements:
      - Procurement and inventory information not previously made available.
      - Reporting of University purchases by zip code and supplier to assist with economic impact analysis.
- **General Notes:**
- SIRI is a campus wide initiative that brings benefits to individuals and organizations across the University. It is called an Initiative because of the ambitious vision it lays out and the many years it will take to fully realize the vision.
  - Beau Willis, Executive Sponsor, with a Steering Committee representing Student Affairs, the Provost, UB Foundation, CIO, and University Business Services provides University leadership for the Initiative.
  - The SIRI project team is truly a collaborative effort from many organizations (Academic Planning and Budget, CIT: Academic Computing Communications Team, Administrative Computing, Enterprise Infra-structure, and OSS, University Business Services Financial, Procurement, and Technology, UB Foundation) and many others.
  - Releases are deployed first to the SIRI Customer Sub-Team representing a diverse set of departments and organizations from across the University. Deliverables are next released to those individuals with previous access to Resource Management reports largely comprising CFO's and their staff. Lastly, deliverables are rolled out to the rest of the campus.
  - SIRI has significantly increased both our technical and non-technical skills and experience with data warehousing, reporting, and analytic solutions. These skills will be very helpful as SIRI goes forward.

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## **SIRI Benefits**

- **Single Authoritative Source and Single Reporting Solution first steps**
  - o UB2020 Strategic Planning and Budgeting Process: Delivers information and reporting solution that brings together Student, Research, Financial, HR, Philanthropy, and Facilities information and reports in one place designed specifically to support University strategic planning.
  - o Financial and HR: First SIRI deliverables that will serve as an information and reporting solution that BARS Campus Inquiry, People and Money, UB First, and InfoSource On-line Financial and HR will be able to transition to, replacing those systems. Note that SIRI needs to be fully deployed in production across the campus and create a sufficient comfort level that existing functionality has been replaced before turning off the systems being replaced.
  - o Significant progress addressing data quality issues, although much work remains to be done. Incorporation of data standards for terminology and definitions increases the consistency of information across funding and organization sources.
  - o Provides a strong foundation for data warehouse and reporting for the new Student Systems Replacement project.
- **Efficiencies:**
  - o Creates capacity across the campus by significantly streamlining the work required for supporting the Resource Management process. Capacity arises from not having to conduct a campus-wide review process, addressing issues, making the information more easily accessible, adding the ability to link the reports to the underlying data, and updating the information on a regular basis.
  - o Once SIRI financial and HR has been fully deployed, issues are addressed, and the campus is comfortable that existing systems are replaced, BARS Campus Inquiry, People and Money, InfoSource On-line financial and HR, and UB First can be de-commissioned. Note: elimination of BARS Campus Inquiry does not eliminate BARS, but instead makes important progress towards replacing services it offers and moving closer to its replacement. This will result in savings both in terms of needing to support those systems, but also more importantly, will dramatically reduce the number of places people need to look to get information and answers.

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## *SIRI Future Phases Recommendation*

- **Phase III: Financial and HR enhanced.** Phase II requirements identified a set of Financial and HR information that customers sought. Phase II implemented the minimum required to meet the defined scope. Phase III will complete financial and HR information identified.
- **Additional phases in discussion**