# SIRI FINANCIAL DASHBOARD UPDATE

SIRI – Financial: Your Dashboard, Your Way

University at Buffalo The State University of New York

# THE PRESENTERS:

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# BACKGROUND

Why New Financial?

# Why Create a New Financial Dashboard

- Simplify reporting for all customers regardless of financial background and experience
  - Sources and Uses regardless of funding source business rules or terminology (ex: what's difference between allocation and revenue?)
  - Display the information customers need for day-to-day operations and strategic decision making
- Report numbers based on a "common sense" financial approach as opposed to funding source specific accounting practices (ex: fringes are an expense, not a negative revenue)
- Align terminology, business rules and calculations to UPlan

# Continued…

- Consolidation of numerous dashboards into one financial “portal” for all level of users (UBO to admin support).
  - Links to web content, support tables, news and information
  - Eliminate duplication of reports
  - Easier to find the report to meet your needs
- New features and functionality
  - Ability to add/remove columns, sort on multiple fields, create filters, and build custom calculations (demo to come)

# NEW POSSIBILITIES

## Let's tackle the transition together!

Our Approach:

- Engage users across campus in pilot phase
- Ensure regular communication
- Provide training resources
- Gather feedback
- Adjust to meet user needs

# SIRI New Financial – Pilot Group

| Central Business Offices | 14 users |
|---|---|
| Resource Planning | 5 users |
| UBOs & Unit Financial Staff | 92 users |

Total: 111 Participants over ~3 months

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# Feedback

- **150+** items received to date!
  - Feedback form, emails, meetings & conversations with UBOs and financial staff
- SIRI Team evaluated each item
  - Corrections and enhancements made to improve user experience
  - Decisions guided by majority rule, system limitations, and availability to customize views
- Major Feedback Themes
  - Formatting & Filters
  - Data Accuracy
  - Terminology Alignment with UPlan
  - Additional Features & Documentation

# What Worked Well

- Consolidation of legacy dashboard into one streamlined view
- Enhanced customization features to meet user needs
- Clickable crosswalk document for easy navigation
- Comprehensive dashboard page overview document
- Frequent communication and follow-up with pilot group

Insights from a wide range of pilot users helped shape a better, more user-friendly dashboard

# Pilot Group – Next Steps

- Continue to review and prioritize feedback
- Implement suggestions and “finalize” dashboard
- Retire legacy dashboards
- Finalize written and video instructional resources
- Continue gathering feedback post-launch

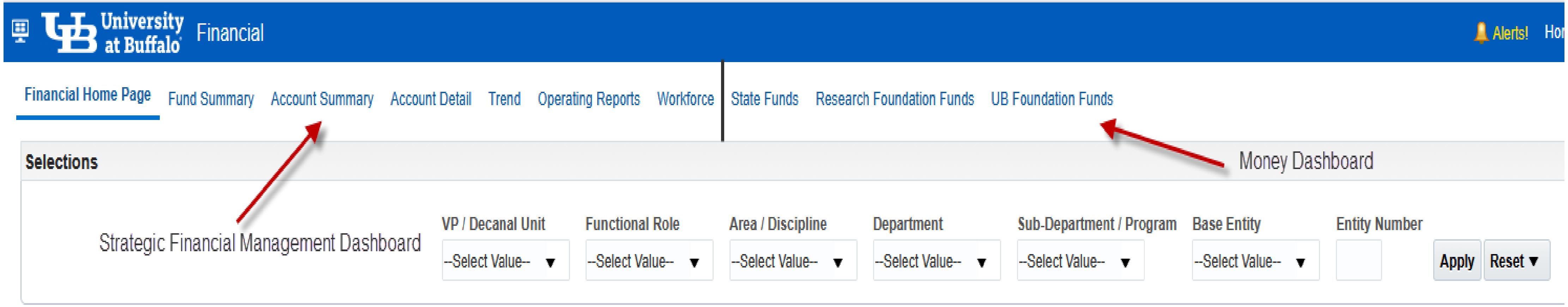
**Estimated Go-Live: End of Year**

# Your Role Moving Forward

- How can you help?
  - Use the new dashboard
  - Continue to share feedback and training suggestions

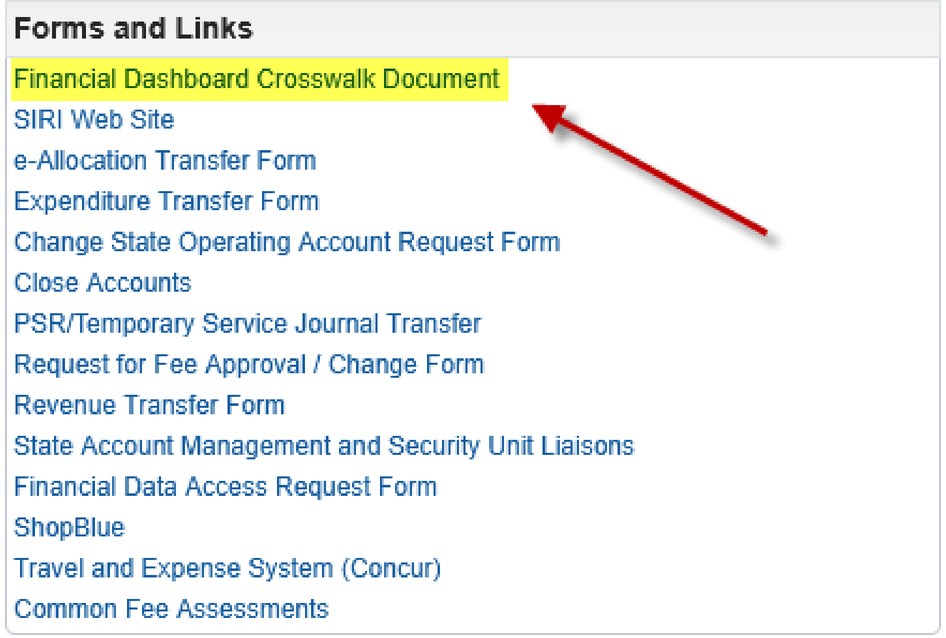
# SIRI New Financial - Demo

- Let's take this sucker for a ride!



# Financial Dashboard Crosswalk Document

- We’ve heard your requests for a crosswalk to help navigate the transition from the legacy SIRI dashboards to the new **SIRI Financial Dashboard.**
- The crosswalk document includes a **clickable table of contents** listing all reports from the soon-to-be-retired dashboards. Simply click on the name of any report, tab, or dashboard to jump directly to its location in the document.



# SIRI PLANS FOR THE FUTURE

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# SIRI Plans for the Future

- Based on the same principles and ideas for New Financial:
  - Enhance existing reporting to take advantage of new features and functionality
  - Demystify funding/employer specific business rules, terminology and data
  - “Common sense” approach to reporting
  - What’s next?
    - Procurement dashboard enhancements including ShopBlue reports
    - Service Center dashboard to work in conjunction with BlueServices
    - New Human Resource dashboard?

# How did we/I do?

**Complete the session survey using your smart device:**

Scan the QR code provided on your schedule.

**OR**

Scan the QR code shown here.