Cash Dash

Presented By:
Trafton Boothby, Christie Djidjev, Andrew Bell, Matthew Chesser, Seamus O'Meara

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The Problem Pitch

► The 350 Spectrum Warfare Wing (SWW) Financial Management (FM) Office currently needs a **comprehensive system** that provides insights into the **planning, budgeting, and execution status of the organization**.

► Requested product - Establish a **Business Management Dashboard** that collects:

   ► Budget positions, funded/unfunded requirements, Commander priorities, and contract tracking/status

► Why?

   ► To help decision-makers make informed decisions with allocated resources
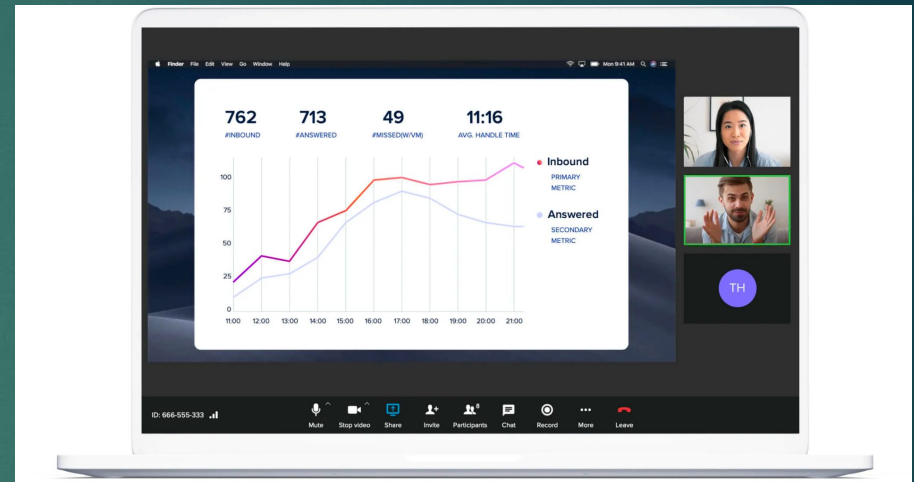
First Steps & Initial Idea

➤ Initial interviews + research to get familiar with FM

➤ Possibility of an already existing/ implemented solution

➤ Issues regarding ACC Dashboard

➤ Our pivot
   ➤ Training
   ➤ Collaboration

Interviews Conducted: 26

- ► Zoom/Teams Interviews (Avg. of 30-90 minutes each): **22**

- ► E-mail Correspondence: **3**

- ► In-Person Interviews: **1**

Interviewees included:

Jenna Hyde, Victoria Howes, John Hannah, Jerry Hernandez, Thomas Donigan, Kimberly Holder, Derek Hossbach, Trystan Link, Kermitt Francis, Christopher Orpilla, Elizabeth Raley, Joseph Clark, Breann Trager, Robin Newton, Elaine Boothby

Mentors & Their Affiliations

Mentors:

► Problem Sponsor - Victoria L. Howes, Deputy Comptroller

► Senior Leader - Jenna M. Hyde, Comptroller

Tech POCs:

► Capt John Hannah, Flight Commander, Software Development

► Christopher Orpilla, Data Officer, Contracted

A Few Key Individuals

- ► Key Beneficiaries
  - ► **Jenna Hyde** - Comptroller / Senior Leader
  - ► **Victoria Howes** - Deputy Comptroller / Problem Sponsor
    - ► They wanted a new Dashboard to fit the specific needs of each section of the 350 SWW's FM Team
  - ► **FM Resource Advisors (RAs)**
    - ► Struggles with collaboration & annoying data access permissions
- ► **Christopher Orpilla** - Tech Expert + Support
  - ► Has been a great resource for information on the systems that the SWW uses
  - ► Showed us how/where available data & systems could be used in our solution

Universal Market & Business Features

➤ A comprehensive dashboard can help financial teams to identify funding gaps, prioritize investments and make data-driven decisions

➤ A couple of ways it can help **save time and resources**:

   ➤ **Real-time collaboration**, quickly identify the spending trends, inconsistencies, etc.

   ➤ **User-based access controls -** initial permissions, no need to give/receive permissions every time

   ➤ **Automating manual tasks**, e.g. data entry or report generation

Our Trajectory

Enthusiasm:

► Improving the 350 SWW FM office's planning, budgeting, and execution processes

Frustration:

► Late swap to new Problem (Data->Cash)
► Multiple pivots
► Scheduling

Finding Our Pace:

► Learned more about DoD practices/behavior
► Gained experience with various Microsoft tools

Settling In:

► Eventually settled on a hybrid solution pulled from our initial ideas:
  ► Incorporate feedback and insight from different stakeholders
  ► Leverage the practicality of Microsoft Tools

Client Feedback

"We don't want a dashboard, we are requesting a [working, business management] tool… being able to link the PowerBI dashboard to our tool is important" - **Victoria Howes**, 3/22

"Using that tool, not reinventing the wheel, but creating our own from that" - **Jenna Hyde** 3/15

"I think you are absolutely right with that 'cause at the end of the day, it's about the user. It's about what we can do to help the end user" - **Kermitt Francis**, 3/13

"I don't want you guys to get caught in between a sales pitch and people going against each other" - **Jenna Hyde** 3/15

Workflow Comparison Chart
Current vs. Revised

Current Data Update Process

Pull & Upload Data

RAs Filter/Update Spreadsheets

1

2

3

4

5

Finalized & Re-Uploaded

Analyst Download & Review

Re-Upload to LCMP

Revised Data Update Process

Automated Notification

1

2

3

Comptroller & Analyst Review

RAs Filter/Update Necessary Parts Only

Our Revised Org-Chart
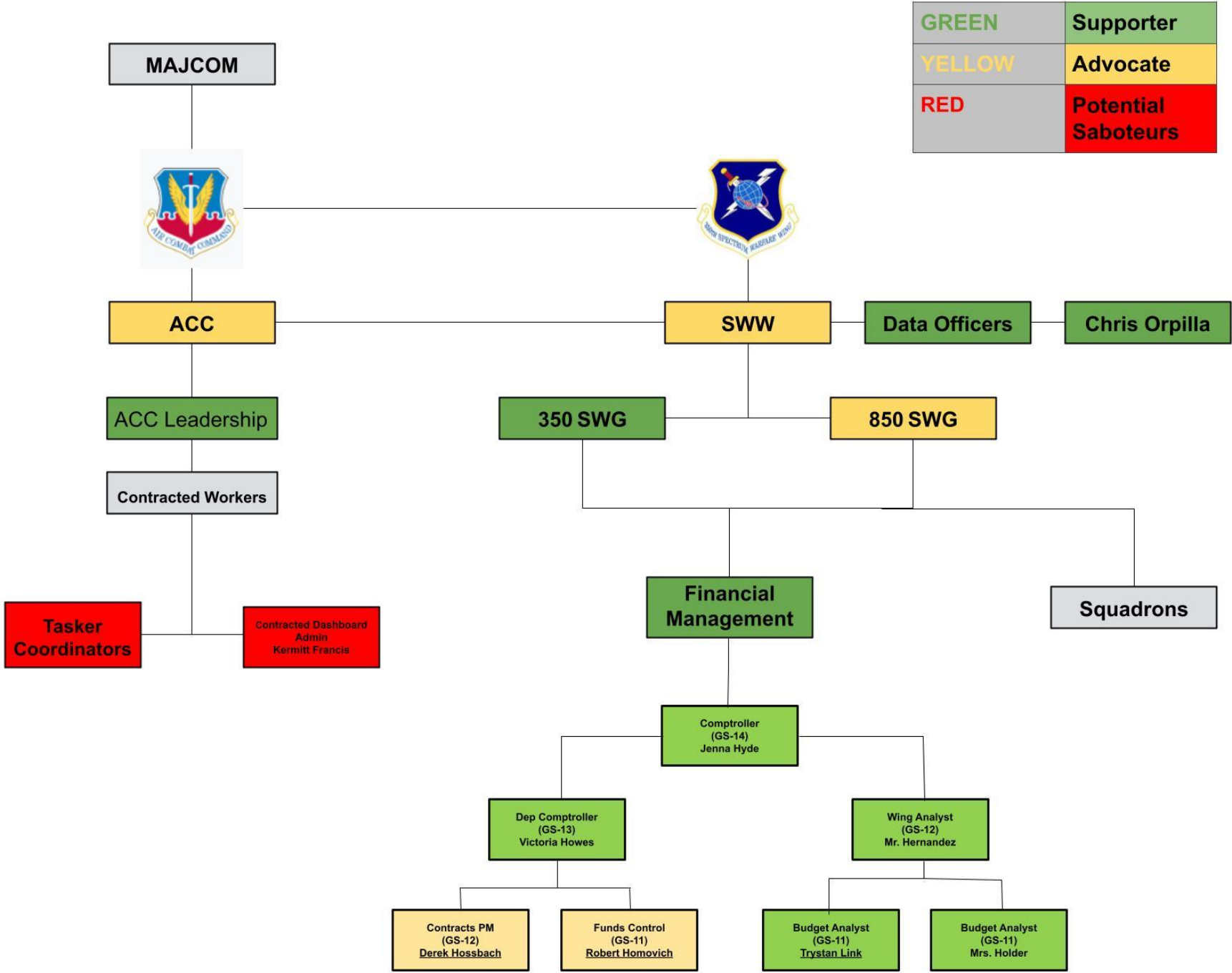
Beneficiary Update

What did we learn from our Interviews?

► What we wanted to learn

  ► What does the **data pipeline** look like? How much **time is saved**? What are the **cost/benefit/budget allocations**?

► What we learned

  ► FM Workers' median salaries, converted to hourly wages for **cost/benefit** calculations

  ► General/vague **data pipeline**

  ► more workflow & **time-save** specifics

► How did this change things?

  ► Continue testing MVP, researching requirements, creating visualizations + Creation of a theoretical Dashboard

► Action Items

  ► More Teams and **SharePoint testing**

  ► Refine MVP w/ Orpilla (Create **example dashboard** hosted on an **example SharePoint Site**)

  ► Refine **budget/funding requirements** for our MVP

Initial MMC

The Mission Model Canvas

Mission/Problem Description:	Designed by:	Date:	Version:
Confusion w/ Dashboard data	Cash Dash team	January 31, 2023	2

KEY PARTNERS
- Foreign military sales
- Funding from DoD entities
- Microsoft for Power BI

KEY ACTIVITIES
- Brainstorming/Design meetings
- Dashboard discovery
- Data organization
- Retrieve example data from DoD
- Start on visual of the new dashboard
- Data Analysis/Organization
- Power BI (free version) testing

KEY RESOURCES
- Access to DoD current dashboard
- SWW tech POC
- Power BI
- Financial Data Providers (Comptrollers/ Management)

VALUE PROPOSITIONS
- Saves time by allowing different tiers of management the ability to only see information that they need or is relevant to their position as decision-makers
- Also gives aforementioned management information of the appropriate level (e.g. low-level for specificity, high-level for executives, etc.)

BUY-IN & SUPPORT
- DoD engineers
- Problem Sponsor: Victoria L. Howes
- Senior Leader: Jenna M. Hyde
- SWW Financial Management team
- DoD Resource Advisors
- Current SWW engineers

DEPLOYMENT
- Compatible software
- Ease of Integration
- Power BI for the dashboard
- Role-based access to our application on their dashboard
- Hide/show relevant and readable information based on role
- UI elements that allow non-management users to submit a funding request for management to review/accept/reject easily

BENEFICIARIES
- SWW Financial management/services
- SWW Squads
- Potentially/Hopefully all finance management positions across the Air Force

MISSION BUDGET/COST
- 6-month time period for development of MVP
- Potential license for Power BI
- Total cost is unknown at this time

MISSION ACHIEVEMENT/IMPACT FACTORS
- A new dashboard that improves on issues from their current dashboard
  - Dashboard to target/monitor resources and funding
  - Financial data analysis
  - Some sort of approval system for funding
  - Single place to see where all funding is coming from and going
- Get in contact with and work with the SWW tech BI

Final MMC

The Mission Model Canvas

Mission/Problem Description: Confusion w/ Dashboard data	Designed by: Cash Dash team	Date: April 13, 2023 — Version: 12

KEY PARTNERS
- Microsoft Applications
- DoD Microsoft dedicated team

KEY ACTIVITIES
- Microsoft Teams discovery
- Admin/permissions/roles discovery
- License financing
- Testing
- System integration
- Policy discovery
- System training

KEY RESOURCES
- Christopher Orpilla
- John Hannah
- Jenna Hyde
  - For approval and access
- Operations and maintenance funds (O&M)
- Someone/something to train FM

VALUE PROPOSITIONS
- Real-time cloud collaboration applications - Through specific Microsoft Teams Cloud Collaboration Tabs [1,2,3,4]
  - Guideline for setup
- Task-planning through specific Microsoft Teams Tabs [1,2]

BUY-IN & SUPPORT
- John Hannah
- Christopher Orpilla

DEPLOYMENT
- Integrate data into Power Apps for collaboration
- Testing within Power Apps to ensure functionality
- Transition current FM members into utilizing Power Apps instead of the current systems

BENEFICIARIES
- SWW Financial Management Leaders [1]
  - Jenna Hyde (Comptroller)
  - Victoria Howes (Deputy Comptroller and Investments Analyst)
- SWW Operation Analysts [2]
  - Jerry Hernandez
  - Jacob Smith (New Hire)
- SWW Budget Analyst [3]
  - Kimberly Holder
- SWW RAs [4]
  - SSgt Christopher O'Brath (WSA)
  - Josepth Clark
  - Elizabeth Raley

MISSION BUDGET/COST
- Labor Cost:
  - Development phase cost: $18,605
  - Implementation phase cost: $18,605
  - Maintenance phase: $97,536
- Hard and Soft costs:
  - Year one: $20,536
  - Year two: $14,136
  - Year three: $14,136

MISSION ACHIEVEMENT/IMPACT FACTORS
- FM Leadership will be able to efficiently collaborate with the rest of the FM wing members within already existing programs the FM has access to.
  - This results in cutting out a big portion of time being wasted on the process of sending spreadsheets, documents, etc. between the FM team and FM leadership

What we did initially

- ► We focused on discovering more about their current dashboard
  - ► Using that information to create a new dashboard focused specifically on the 350th SWW
- ► Role-based access implementation
- ► Hiding/showing prioritized data
- ► Filter options that were more user friendly

Initial MVP

- MVPs for the week:
  - Possibility of Power BI Dashboard UI element implementation on SWW Power BI Dashboard
- What is the MVP testing?
  - Possibility of time-saves from changes in UI regarding: Navigation, user-input, role-based access, and hiding/showing prioritized data
- What data was expected?
  - Dashboard with filter options
- What data was received?
  - Dashboard with filter options available (but possibly not utilized)

Current MVP Overview

- ► Power Automate (PA) allows for automatic responses to events.
  - ► Creation/modification of key files can trigger a notification to key persons.
- ► PA can be used to link directories.
  - ► Link a Page on Sharepoint to a Channel on Teams.
  - ► Link a List to an email (group or individual).
- ► PA allows for virtually any process to be automated.
  - ► Events (called Flows) can be scheduled, automatic, instants, etc.
  - ► You decide the frequency of Flows, and the processes executed.

Power Automate has many premade flows that interact with SharePoint to choose from.

You can also create your own custom flow to suit your specific needs.

1

Power Automate allows you to create new flows that can respond to users actions.

2

PA Links to Sharepoint

Then sends an email to notify that a file has been added to Sharepoint.

3

When any of these lists are created or modified, Power Automate sends an email to a specified (number of) recipient(s).

SharePoint Process Map

DEAMS/CRIS/etc Data Sources → **Datasets Filtered for 350th Needs** → **Automated Upload to Site Library**

Security Automation

SharePoint Site

Access Controls Customizable & Personalized Visuals

FM Requirements Page

FM Buy/Spend Plan Page

Organized Pages Can have different Wing/Group/Squad views

Funded Requirements file

Unfunded Requirements file

Buy Plan sheets

Spend Plan sheets

Real-Time Collaboration Change-Logs Role-Based Access

Yearly Cost-Time Benefit

Cost Benefit ($USD) — Time Saved (Hrs)

SOF (per RA): $15,000 | 30
ODL (per RA): $19,400 | 39
Spend Plan (per Squad): $2,200 | 9
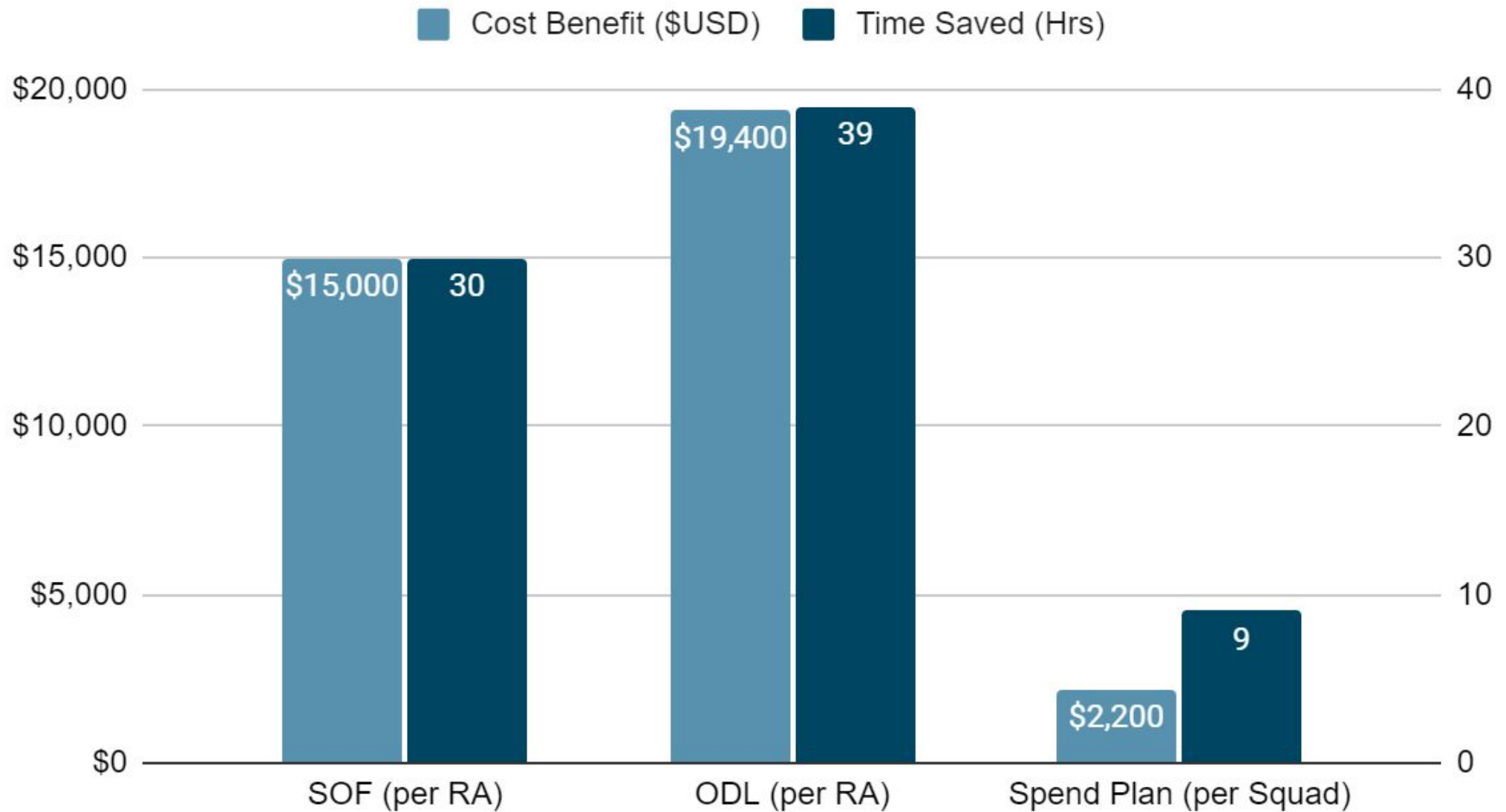
Our Conclusions

- ► More user-friendly process and front-end
  - ► Our MVP shows an example of what a more user-friendly and efficient implementation would look like (Teams/Sharepoint/Power Automate)
  - ► Power Automate would streamline the process of managing files across different applications and platforms.
- ► FM's data processing/collaboration issue
  - ► Microsoft Teams alleviates multiple time consuming processes
  - ► Teams provides quick links to folders, applications, and directories.