SIRI Financial Dashboard FAQs

Contents

General

Q: How do I view two dashboards side by side?
A: There are a couple of ways to do this:

1. **Open SIRI in two tabs or two windows.** Open a second tab (or a new window) and navigate to SIRI again. You can toggle between the two tabs or place each window on a different monitor if you use multiple screens.
2. **Use your browser's split-screen feature.**
   - Google Chrome offers an **"Add tab to new split view"** option:
     - Open Chrome and go to the tab you want to view side by side.
     - Right-click the tab you want to move.
     - Select **"Add tab to new split view."**
     - Choose the tab you want to pair with it from the suggestions or enter a URL.
     - Chrome will automatically place both tabs in a split-screen layout.
   - **Microsoft Edge's or Firefox's** split screen option:
     - Open your second SIRI instance in a separate window.
     - Hover over the icon in the upper right corner of the browser that looks like two boxes (what would be used to make something full screen).

- When hovering over that you will have the option to choose what split screen ratio you would like to use. Select your desired ratio.
- The first window will move to that ratio and options for your second window will show up. Select your second SIRI window.

Q: What is the difference between **Uses and Expenditures**?
A: Uses include both Expenditures <u>and</u> Encumbrances.

Q: How do you **add a column** and have it saved to always show?
A: You can right click on any column name in the report, select Include Column, and select the field you want to add from that list. To save that, you then click the gear in the upper right corner and click Save My Customization and give it a name.

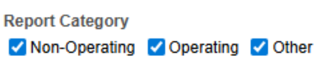
Q: Why are some things in a **blue font**?
A: Anything in blue is a hyperlink to more detail.

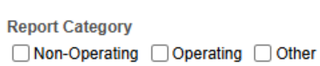
Q: On the **Departments in the Red** Alert report, what is the difference between an Ending Balance of $0 and a blank Ending Balance?
A: Blank would appear on accounts that have no financial activity for the year – these are often accounts that were established during the current fiscal year. $0 appears when there has been some activity, or when the carryforward resulted in a $0 Ending Balance.

Q: What is the difference between **Report Status "No" vs " Yes"**?
A: This indicates whether or not the account should be included on standard campus reporting. For example, undistributed payroll accounts are excluded from campus strategic reporting because they under/over inflate central balances. A good example of something that is considered "N" are RF Suspense accounts.

Q: What is included in **Report Category "Other"**?
A: This category includes specialized categories of funding such as U-Wide Type 2, UBF Annuity/Trusts, Endowment Principle.

Q: Should I **select a Report Category** or leave the options unchecked?
A: Selecting none of the prompts gives you the same result as selecting all of the prompts, and in fact returns results faster.





Q: Where do I find **Fiscal** and **Annual Allocation**?

A: We do not have annual allocation in the strategic data sources – only fiscal (Annual allocation is not available for RF and UBF funds). However, if you look at the STATE FUNDS page, you can right click and add both Fiscal and Annual Allocation.

Q: Why don't I see the **child entities** when entering the parent entity number?
A: To see child entities, select either the VP/Decanal unit or Area/Discipline instead of entering a parent entity number. By entering a specific entity number you will only see that specific entity.

Q: Is **Cash Balance** and **Uncommitted Cash Balance** the same?
A: It is important to note that these are not the same. Uncommitted Cash Balance is **Net** of Encumbrances. Both can be viewed on the State Funds ->State IFR/SUTRA page by scrolling down to State IFR and SUTRA Sources and Uses.

Q: What's the difference between **Actuals** and **Uses**?
A: Actuals are expenditures that have already occurred. Uses include expenditures **and** encumbrances.

Q: Sometimes the **data isn't displaying correctly** - is there something I can do?
A: If you are having issues or a saved customization is causing problems, your first line of defense should be to click REFRESH under PAGE OPTIONS which is found by clicking the gear at the upper right hand corner. If you continue to have issues after trying this, please reach out to SIRI support.

Q: When creating customizations, can you enter **more than one Entity number**?
A: When entering an entity number in the text box, you can only enter 1 number at a time. However, if you use the Base Entity filter, you can select more than one value in that dropdown list.

Q: What is the difference between **Ending Balance and Funds Available For Spending?**
A: Ending Balance is the amount at the end of the year. Funds Available For Spending include the ending balance plus any sources for the year.

Q: Where do I see **scanned images of back-up paperwork**?
A: Scanned images can be found on the following pages: State Funds - Non-Personal Services, UBF – Cost Approver/Fund Images, UBF – Expenses, and UBF – Revenues.

Q: How can I **clear my filters** to see another account without having to refresh the page?
A: You can do this by manually clearing all of the filters you have applied and hitting Apply. This will refresh the data with only the filters you left. If you have multiple filters and you would like to clear them all, go to Reset in the bottom right corner of the selections pane, Reset to default values and hit Apply. This will reset the filters to the default values set for that dashboard.

ACCOUNT SUMMARY

Q: What is the difference between the **Account Summary tab** and the State Funds, Research Foundation Funds, and UB Foundation Funds tabs?
A: Account summary tab aggregates all accounts and all funding sources into one report. The individual funding source pages provides more detail. If you only have access to one account, the views will be very similar on both the Account Summary tab and the funding source tab associated with the account.

ACCOUNT DETAIL

Q: If I have **multiple account numbers**, will they all show together like they do on money tab?
A: Yes! You can look at multiple accounts by filtering based on Org Structure as opposed to a single account number.

Q; Are we able to access **individual transactions**?
A: Yes! Individual transaction data will be found on the fund specific tabs (State Funds, Research Foundation Funds and UB Foundation Funds).

STATE FUNDS

Q: Where can I find more details about **procurement card transactions**?
A: Detail can be found in the Procurement dashboard which is separate from the Financial dashboard.

RESEARCH FOUNDATION FUNDS

Q: How do I see my **RF Suspense accounts**?
A: To view suspense accounts, check REPORT status of "N."

Q: Is **RF data by fiscal year**?
A: Since Research Foundation funds do not have a fiscal year associated with them, data shown is grant-to-date.

Financial Homepage	Fund Summary	Account Summary	Account Detail	Trend	Operating Reports	Workforce	State Funds	RF Funds	UBF Funds

UB FOUNDATION FUNDS

Q; Where do I find a **UBF report for balance listings with date ranges**?
A: The Fund Activity Report under UBF in the REPORTS folder on the lower right-hand corner of the homepage will show that information.