

# STATE SIRI FINANCIAL AND EBUDGET ACCESS REQUEST FORM INSTRUCTIONS

**Purpose:** Use this form to request access to State Financial and eBudget data.

**Access being requested:** Please choose the appropriate box for the access you are requesting.

"**Authorize new access**" should be selected for setting up access for the first time for an employee.

"**Add additional access**" or "**Remove partial access**" should be selected when you are changing access for someone that already has some financial data access.

"**Terminate all access**" should be used if the person is leaving the department, changing duties, or has left the university and should have all financial data access removed.

\*If you are requesting new access for someone that is replacing a person in your department, please indicate the person that is being replaced so that we can terminate access if appropriate.

**User Information:** Please complete all User Information for the individual for which you are requesting access.

\***NOTE:** Access cannot be established until the person has an active appointment at the University at Buffalo.

**Access Requested:** Please specify the Financial Applications that the individual you are requesting access for will need to perform their duties.

**SIRI Financial Dashboards** - Select dashboards that the user should be granted access to in SIRI. The most common financial dashboards are listed on this form. A complete list of [financial related dashboards](#) is available on the Administrative Services Gateway web site.

**Operational Dashboards:**

**Money (all tabs)** - includes transactional financial data. Main tabs included in this area are Fund, Account, Line, Budget Revision, OEC, and FTE, IFR fees and Reports.

**Money (OTPS tab only)** - grants access to OTPS tab in SIRI Money.

**Procurement**- includes eREQ, inventory, procurement, and payment data used for day to day operations.

**Account Management**- targets areas of potential concern and provides users with a collective view of all accounts.

**eBudget** - Select the role that the user should have in the eBudget system:

**Creator** - select if the user should have the ability to create budget revisions. A creator will be able to include any account number in the budget revision. For this reason, it is not necessary to complete the "access level" sector for Creator only access.

**Approver** - select if the user should have the ability to approve budget revisions. Selections in the Access Level section must be identified.

**Access Levels:** Data access can be granted based on the following Organizational Structure (entity-O) levels. Please refer to the Organizational Structure tab under the "Support Tables" dashboard in SIRI to ensure access is granted at the appropriate level.

**VP/Decanal** (grant access to all accounts within that VP/Decanal area)

**Unit** (grant access to all accounts within that Unit)

**Department** (grant access to all accounts within that Department)

**Entity** (grant access to all accounts within that entity)

**Account** (grant access only for specified accounts)

\***NOTE:** If different access is required for different applications, please complete a separate form for each application.

**Note:** Access granted at an Organizational Structure level (VP/Decanal, Unit, Department, or Entity) will also provide access in SIRI to UB Foundation (UBF) accounts that are in the selected Organizational Structure.

**Justification for access/comments:** Indicate the reason access is being requested for the individual.

**User Agreement:** The user will need to agree to abide by the policies that govern data of this nature, being aware of its sensitive nature.

**Approved Departmental Signature:** The appropriate department approver and the CFO for your unit are required to sign this form to authorize the requested access.

**Submission:** Please send completed form to Financial Management at 418 Crofts Hall. If you have questions, please contact Tricia Canty ([tscanty@buffalo.edu](mailto:tscanty@buffalo.edu)) or 645-2639.

**If Employee Data access is required, please complete the [Employee Data Access Request Form](#).**

**If Student Data access is required, please complete the [SIRI/InfoSource Student Records Access Request Form](#).**

**If Research Foundation access is required, please complete the [RF Financial Data Access Request for SIRI Form](#).**

# STATE SIRI FINANCIAL AND EBUDGET DATA ACCESS REQUEST FORM

Authorize new access       Add additional access       Remove partial access       Terminate all access

Effective Date

Name of person being replaced

## User Information

Name       Email

Department       Person Number       Ubit Name

Phone Number       Official Job Title

Supervisor's Name       Supervisor's Email

### ACCESS REQUESTED:

#### SIRI Dashboards:

Money (All tabs)       Money (OTPS tab only)       Procurement       Account Management      Other SIRI Dashboards:

#### eBudget Revision:

Creator only       Approver

### ACCESS LEVELS: (section not required for eBudget Revision Creator only access)

VP/Decanals:

Units:

Departments:

Entities:

Accounts:

**NOTE: Please complete separate forms if different access to applications is required**

Justification for access/Comments:

## User Agreement

I agree to utilize UB Financial Data for business purposes only. I understand the sensitive nature of the data and will not disclose or use it for personal gain. I have read and agree to the [Information Security: Data Access and Security Policy](#).

User Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### Approved Departmental Signature Authority for the Area(s) Requested

Name       Email

Department       Official Job Title

Department Signature: \_\_\_\_\_ Date: \_\_\_\_\_

CFO or Appropriate Signature \_\_\_\_\_ Date: \_\_\_\_\_