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I. Signing into SIRI

A. Logging on

The website for SIRI is:

https://siri.buffalo.edu

Please note that you must use “https”, a secured site. Type this URL into the address field of your browser. You can also add the website to your list of favorites or bookmarks. Important information, news and updates are found on this page. This website can be used with Internet Explorer or Firefox. If you are using IE 9.0 you may have issues viewing SIRI unless you turn on the compatibility mode. Your IT support people can assist you with this.

If accessing SIRI from off-campus, you must use the UB VPN – see page 4.

Click on the link under “Sign onto SIRI”. The following logon screen is displayed.

Enter your UBIT username and password, and click on the Log In button. After your user ID and password have been verified, the default Welcome page is displayed with information about training, what’s new and data update frequency. On the top of the screen in the dark blue area are listed the dashboards and reports that you have been given permission to access.
B. Accessing SIRI off campus

Off campus access to SIRI requires the use of UB VPN software, or some other departmental VPN solution, in order to secure and encrypt data communication with SIRI. Please contact your technology support staff for assistance. VPN information can be found at http://ubit.buffalo.edu/vpn/.

C. Questions

If you have any comments or inquiries about SIRI, please use the following email address – SIRI@business.buffalo.edu.

II. About SIRI Security

SIRI supports security mechanisms that allow users to access only the data for which they are authorized. There are two types of security that are included:

*Presentation Catalog Object security* –

This security mechanism provides security for objects in SIRI, such as, dashboards, dashboard pages/tabs, and reports. Users can view only the objects for which they are authorized. For example, you may have authorization to view dashboards like People, Money and Procurement only.

*Data Level security* –

This security mechanism controls the type and amount of data that is available in a dashboard or report. When multiple users run the same report the results that are returned to each user depend on their access rights and roles in the organization. For example, you are only able to see your own accounts in the Money dashboard reports.

See APPENDIX for the forms and procedures to be used to obtain security access.
III. Dashboard Page Contents

A. Links and Buttons in Heading

On the upper right side of all screens the following links and button are displayed:

1 – clicking on this link will activate the dashboards at the top of the screen if they are not there already. It accesses the Interactive Dashboard page from which you can view the dashboards to which you have access.

2 – clicking on this link will display the My Account screen where you can see your account information, such as, your default dashboard preference, security groups and your display name. This page also contains other functions that are not being used at this time, such as, setting up delivery options.

3 – clicking on the Page Options button will allow you the capability to personalize what data will come up on your dashboard – both prompts and results - when it is opened. See page 8 for more information.

4 – clicking on the Log Out link will close this SIRI session. Always use this link to log out of SIRI.
B. Other Symbols

These are found on the bottom left of the dashboard pages:

- This symbol represents **Refresh**. When clicked the dashboard contents will be re-displayed. For example, if you click this button on a dashboard tab, the report will be re-run to show the results of the process again. When you are working with results in SIRI, such as, table views, you can refresh the results of the current request. Refreshing results is useful if you make a change such as adding a filter that limits results and you want to see the effects of your change.

- This symbol represents **Printing** screen contents. You can display printer-friendly versions of existing SIRI screens and requests. You can print using HTML or Adobe PDF. Adobe Reader 6.0 or greater is required to print using Adobe PDF. These two options are displayed when you click on the button. For HTML, a new window shows the selected item – to print choose File → Print on the browser menu. For PDF, an Adobe PDF window shows the selected item – use Adobe options to print the file. Note that the HTML method of printing relies on the print handling capabilities of your browser. If you do not get the results you want, choose PDF to open and then print the dashboard or request. The HTML print option only shows what is displayed on the page. Make sure that if your report has more than 25 records you open all records by using the arrow with the asterisk at the bottom of the report or only the first 25 lines will print.

  This is a “print screen” button for HTML purposes. See page 14 for details.

- This symbol is located on the right-hand side of the dashboard page sections, and when clicked, will **collapse** sections of the dashboard report display.

- This symbol will replace the above symbol on the right-hand side of the screen, and when clicked, will **re-open** the section of the dashboard report display that had been collapsed.
SIRI Interactive dashboards provide points of access for analytical information. When an end user accesses SIRI, the user can see the reports that contain content specific to the needs of individual users or groups.

Both operational and strategic data is available in the various dashboards. For example, operational dashboards (more detailed level of information) include People, Money and Procurement; while strategic dashboards (more reporting oriented) include Human Resources, Financial and Purchasing.

Once a dashboard is selected the tabs or pages of that dashboard are displayed. For example, this diagram shows the available tabs for the Procurement dashboard. Click tabs to move between the pages of the dashboard.
D. Page Options

Saved Selections in Page Options allow users to view dashboard pages with their most frequently used or favorite choices for filters and prompts preselected, without the need to make choices manually for prompts and filters that appear on the dashboard page. Users can save multiple view selections with different combinations of prompt and filter choices, and switch between them.

In SIRI you have the capability to personalize what data will come up on your dashboard page when it is opened. Bring up the dashboard tab and run the report that you wish to see by entering the selection criteria (also known as filters or prompts) and clicking on the GO button. Here you can apply what you have already selected and save the current selections as it is on the screen. To do so click on the Page Options button in the upper right hand corner. The following will be displayed:

1 – Save Current Selections

To save the selection for your personal use, place your mouse over Save Current Selections and select For Me.
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Type a descriptive name for the selection to save it. Click on the box if you want to make this your default option each time you open this dashboard tab. Click on OK.

You can create as many selections as you wish following these same instructions.

Once created you may wish to delete a selection or change your default selection. You would click on Edit Saved Selections and Defaults.

The following screen will be displayed where you can specify defaults, rename or delete your selections. Once all changes are completed, click on OK.

The button that the arrow is pointing to allows you to rename the Saved Selection. Or click on the red ‘x’ button to delete the Saved Selection. The default selection is shown in bold type with the radio button chosen to the left of the name. Click on the appropriate radio button to change the default Saved Selection, or restore the basic dashboard as your default view by clicking on the radio button next to “None”. Click on OK when you have completed your changes.
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2 – Apply Saved Selections

To apply or use one of your saved selections, click the Page Options button on the dashboard page and choose *Apply Save Selections*. Your personal Saved Selections, if any, are shown in the displayed list. Your current default selection is shown in bold type. Click a Saved Selection in the list to apply it to the underlying dashboard page. In this example, the filters for the named All Funds Buyer Distribution selection will be applied to the dashboard page and the appropriate report will be produced.

3 – Clear My Selections

When you choose the *Clear My Selections* option, SIRI will rerun the dashboard page using the default Saved Selections. In this example it will rerun the All Funds Buyer Distribution selection.

This option also is used to clear existing prompt values in addition to Saved Selections.

**NOTE** – This process needs to be done for each dashboard and dashboard page/tab. You can have different selections for each dashboard page/tab.
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IV. Dashboard Page/Tabs Processing

A. Layout

SIRI dashboards provide personalized views of operational and strategic information. A dashboard consists of one or more pages, which appear as tabs across the top of the dashboard. Pages can display sections which appear as columns in the dashboard layout and hold content such as selections (filters and prompts) and results, also called reports, which is the output returned that matches the request criteria specified in the selections area. Examples of results include various types of charts, pivot tables, and tables where you can examine and analyze results, save or print them, or download them into Excel, PowerPoint or a .csv file.

The above diagram is an example of a dashboard tab that contains prompts and filters in the Selections area (1), and the results that contain tables (2), charts (3) and actions that can be taken (4).

Another example of SIRI output showing another specific action follows:
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1 - Selections

A dashboard prompt filters the results of embedded requests to show only results that match the prompt criteria.

You select the data fields to determine the content of the reports resulting in the dashboard or dashboard page. Some fields are dropdowns, such as Fiscal Year; calendars, such as Voucher Date; and edit boxes, such as Account Number. In some cases, the fields being used as filters specify the operation that underlies that particular filter. For example, in the above dashboard selections, the Voucher Number field contains the operation “begins with”, which indicates that results will include only records where the data in the column begins with the value in the filter. Other examples of operations that may be displayed include, but are not limited to:

- “is between” (Check Date above) – include only records where the data in the column is between the two values of the filter
- “is in top” – include only the first n records where n is a whole number specified as the value in the filter
- “contains any” (Invoice Number above) – includes only records where the data in any part of the column contains the values in the filter
- “is null” – the operator tests only for the absence of data in the column and includes only records where there is no data in the specified column
- “ends with” – includes only records where the data in the column ends with the value in the filter
- “is greater than” or “is less than” – includes only records where the data in the column is appropriately greater or less than the value in the filter
- “is equal to/is in” – include only records where the data in the column matches the value in the filter. If no operation is specified this is the default value.

When all filters have been filled in, the GO button is clicked in order to create the resulting dashboard reports. This Selection area allows you to constrain a request to obtain results that answer a particular question.

You can select multiple selections to narrow down the search, and the selection criteria is carried from page to page so you don’t have to re-enter it.

Special handling of selection criteria
Strategic Information Reporting Initiative (SIRI)

There is a special set of dashboard prompts where you can constrain users’ choices for subsequent selection. The Organization Structure seen below is such an example.

Constrained columns will be constrained or limited by all other columns in the prompt. In this example, whatever value is entered in VP/Decanal directly impacts or constrains the values in the rest of the filters. So if “Division of Athletics” is entered into the VP/Decanal field, the other filters will be limited to the units, areas, departments and entities that are part of Athletics.

2 - Tables – This type of result shows data in columnar form. Users may be able to navigate and drill down in the output depending upon the table. These tables may contain totals, customized headings, special formatting, and formula or aggregation rules for particular columns. While there is a built-in default column sort for the table, many of the columns of tables in the dashboard can be sorted by clicking on the column header.

3 - Charts – SIRI supports a variety of standard chart types, including bar charts, column charts, line charts, pie charts and scatter charts. Custom chart sub-types include two-and-three-dimensional, absolute, stacked, combination and custom.

4 – Actions to be Taken

The results will be displayed after the GO button is clicked. Typically a maximum of 25 records will be displayed in table output. If there are more than 25 records in the result, at the end of the dashboard report, the following symbols are displayed:

- **a** – this will re-display the beginning 25 records if you are further down in the listing. It is grayed out here since we are looking at the first 25 records.

- **b** – this will re-display the previous 25 records. For example if you are viewing records 51-75, clicking on this button will display records 26-50. Again it is grayed out here since we are looking at the first 25 records.

- **c** – this will display the next 25 records, in this case records 26-50 will be shown.

- **d** – this will display all of the records of the resulting dashboard page report. The screen will then include the actual number of records that are the result of this report. If you are
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printing in PDF or downloading the report, you do not need to click on this button first in order to obtain the entire file. However, if you print using HTML, you will need to click on this button to print the entire file.

B. Specialized Actions on Dashboard Page

Next, at the bottom of the report, these three words or links are displayed.

Refresh - Print - Download

1 – **REFRESH** – when you are working with views of dashboard page reports, such as, a table, you can refresh the results of the current request. Refreshing results is useful if you make a change such as adding a filter value that limits the results and you want to see the effects of your change. This action is not always included since some of the dashboards are not real-time data updated.

2 – **PRINT** – you can display printer-friendly versions of existing dashboards and requests. A printer-friendly version does not contain any extraneous links or other hypertext items. To print a request or report, click on this Print link, and the following 2 options will be displayed:

[HTML]
[PDF]

You can print using **HTML** or Adobe **PDF**. Adobe Reader 6.0 or greater is required to print using Adobe PDF. Note: the HTML method of printing relies on the print handling capabilities of your browser. If you do not get the results you want, choose PDF to open and then print the dashboard report or request.

For **HTML**, a new window shows the selected item without extraneous links. Choosing this option will print what is on the screen. To print the entire report in HTML Click on , if necessary, to display all of the records. Choose the browser’s printing method to print the report/request.

For **PDF**, an Adobe PDF window shows the selected item. Use the options available in the Adobe PDF window to save or print the file. Choosing PDF will print the entire report in PDF format.

When printing a report, page settings, headers and footers will be included in the PDF and HTML outputs. Note: that if you print the PDF on a local or network printer, the
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print selections specified in your browser are in effect, such as the selection for paper size.

3 – **DOWNLOAD** – SIRI provides options for downloading dashboard page results. When you click on this link, the following options are displayed.

- **Download to Excel**
- **Download to Powerpoint**
- **Download to Excel 2000**
- **Download Data**
- **Download Web Page (MHTML)**

**Download to Excel** and **Download to Excel 2000** – this option makes the request results available to Microsoft Excel or Microsoft Excel 2000 in HTML format, including tables or charts that appear with the results. It also includes any other views included in the report, as well as headers, displayed filters and totals. Excel controls the positioning of the HTML. Save the file, once downloaded, in the desired location. If desired, use Excel to refine the formatted results. Note that if changes are made to the downloaded report that will affect totals, the downloaded totals will not be updated. Because they are hard numbers, you will have to add formulas to the spreadsheet to ensure the totals are accurate.

**Download to PowerPoint** – this option will allow you to download the dashboard results into a Microsoft PowerPoint presentation. The system will prompt you to save or open the file. It is recommended that you save the file using PowerPoint. Each page of the report will be displayed on a PowerPoint slide and will contain standard SIRI headers and footers.

**Download Data** – this option downloads results as a tab-separated list of values. The file will have a .csv extension to facilitate opening it in Excel, Access or other applications that support .csv. After downloading a request in tab-delimited format, you can use a third-party application to display the data. After the download, save the file.

**Download Web Page (MHTML)** – this option downloads the results as a Webpage. This allows you to download the underlying data for an existing request as a Web page (MHTML) file. When you choose this option, the File Download dialog box appears. Save the file.
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C. No Results

If there are no records retrieved using the Selection filters, the following is displayed.

No results
There was no data returned.

Change filters appropriately and re-run the dashboard report by clicking on **GO**. This can also happen if you do not have the proper security access to the information you are looking for. Please see the Appendix section for more information on security.
V. SIRI Reports

A. Filters Processing

SIRI provides standalone reports that are not part of a dashboard page request. These also have prompts where you can filter the report’s results. They are displayed in a specialized sequential manner. An example of reports follows:

Each report could have prompts of various fields that are displayed in a specified order. These prompts are the same types that are used for Dashboard filters – *dropdowns, edit boxes*, and *calendars*. As with all filters, there is a field or column being prompted, an operation (such as equal to) and an entered value or values.

There are buttons associated with each prompt that allow you to select the proper entries to be made for the type of results that you are seeking. While each and every button may not be included on each field prompt, these buttons include:

1 – *Cancel* – this option will end the processing of this report request and return you to the list of reports.

2 – *Skip Prompt* – this option will allow you to omit entering anything for this particular field. In effect it is selecting “*all choices*” value for this particular column of information. It will go to the next field that is being prompted or if this is the last field prompt, SIRI will run the report to produce the requested results.
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3 – Previous Prompt – this option will return you to the previous field prompt which will no longer have the value in it that you had entered before. Therefore, you have the opportunity to re-enter the value of this previous column prompt.

4 – Next Prompt – this option will be used to move you to the next field to be prompted. However, a value must be entered for the current field before you can click on this button; otherwise you will receive an error message telling you that a value is required. This button will not appear on the last field prompt.

5 – GO – this option is displayed only on the last field being prompted. It will cause SIRI to run the report using the entered prompt information to produce the requested results.
B. **Other Selection Actions**

These are found as part of the filter selection definitions.

In some cases, you will be allowed to enter multiple values for a particular field prompt (1). Enter your first value and then click on the “*Add Another Value*” link. This will bring up another box where you can enter another value.

As you can also see, there are times when a list of possible values (2) is provided in the prompt. You can click on your selected value and it will automatically fill in the *edit box* to the left of the prompt screen.

The **red “x”** is also available so that you can delete a value that had been entered incorrectly (3).
By entering a value in the box on the right hand side of the prompt and clicking **Refresh**, you can constrain or limit the results to select from for this field’s value.

The Match operation dropdown contains “begin with”, “ends with” and “contains”.

**Begin With** – the field values to be returned will begin with the letters that are entered.

**Ends With** – the field values to be returned will end with the letters that are entered.

**Contains** – the field values to be returned will have the letters that are entered anywhere in the field values - beginning, middle or end.
In this example, a *calendar* is provided for selecting the particular date you wish to use for this prompt. You can enter the date manually if you wish using the following format - mm/dd/yyyy.

In some filters for reports, a line of instruction may be provided at the top of the filter prompt to aid you in knowing how the field operation will work. In this example the completion date will need to be between 2 dates that are entered in the boxes.
This is an example of a **dropdown** filter, where you will click on the arrow which will list all of the options you can select from. Click on the selection you want to use to return the results you are looking for.
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VI. Navigation and Drill-Down

A. Description

Many of the results that appear in SIRI represent hierarchical data structures. This allows you to access different levels of detail within them. But the dashboard pages can also be designed to provide the ability to drill down the different levels or types of information.

SIRI provides some mechanisms to aid the users’ insight into business issues being viewed in dashboard page information by guiding their exploration of results. When based on common scenarios, guided navigation allows users to see and analyze related issues by going to a related set of results or another dashboard. It also applies to tables as well as charts (such as a pie chart). The user is able to go down several layers of subsequent related data.

There are two types of ways in going deeper into the analysis of dashboard results – navigation and drill-down.

B. Navigation

In certain dashboard pages users have the capability to click on a particular field to delve into another level or type of information regarding the output results. In this case the entire dashboard page or screen will be replaced with new results. With this type of navigation, there may be more than one path that can be followed. An example can be found in the following Purchasing dashboard.

![Supplier Analysis by Commodity or Department or Account]

In this example, if any of the suppliers are clicked, the user can see further information about that supplier for their commodities, departments or accounts. Each thread can go down several more layers. You would click on one of the types of navigation layers. At each level, the following links are displayed so that the user may return to the beginning and start over again with another supplier or another navigation category.

Typically, the field that is being clicked on to provide the navigation has blue letters and is underlined when the cursor hovers over it. In this example, the Supplier Name field is in blue and underlined.
1 – Return – will return you to the beginning of the original dashboard or report.

Note that some dashboards do not have a Return option, for example, the People Detail dashboard. In this case, you have to click on the People dashboard in the dark blue area on the top of the screen to return to the original dashboard page or report.

C. Drill-down

Certain data results have been set up to automatically allow drilling down to further levels of information. For example, a hierarchy has been established for Funding Source to Trial Balance to Account. Another example is All UB Codes to Major Category to Category to Sub-Category to UB Code to Funding Source to Funding Source Code Description. The following is an example from the Purchasing dashboard:

The UB Code field is the original field that can be clicked on so that additional fields are displayed following the hierarchical path. Funding Source will be displayed, and then Funding Source code Description will be displayed when you click on Funding Source field.

The new results are shown directly in the dashboard replacing the original report (default) or replacing the entire dashboard with new results. The default is what is called “drill-in-place” option. Two additional links are provided to go backwards through the hierarchy.

1 – Return – will return you to the beginning of the original dashboard or report.

2 – Back – will move you back one level in the hierarchy of results.
Appendix – SIRI Security

To get access to the following operational dashboards – People, Money and Procurement - the following is needed:

1. An InfoSource ID
   - To obtain an InfoSource ID complete this form - https://isonline.buffalo.edu/infosource/general_info/signup/form.html

2. Access to the data needed

3. Once the forms have been processed appropriate dashboards will be assigned.

To get access to the following strategic dashboards – Financial, Human Resource and Purchasing - the following is needed:

1. An email needs to be sent to Laurie Barnum lbarnum@buffalo.edu requesting what entities are needed.

2. You must complete the Research Foundation data policy at - https://myub.buffalo.edu/data_policy/pw/scripts/rf_data_policy.cgi

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RF Data Policy Acknowledgement

In order to protect private and confidential proprietary data, the policy on the Acceptable Use of Research Foundation Proprietary Data Outside the RF Business System requires that individuals with access to such data agree to:

- maintain the confidentiality of the information
- use it appropriately and only for their position-required duties
- secure passwords
- secure and protect the data, systems, and devices

I agree to safeguard the information and system assets assigned to me and prevent unauthorized use of the information and applications.

I have read and understand the policies and requirements for protecting the privacy and confidentiality of proprietary data and agree to abide by them.

3. Once processed appropriate dashboards will be assigned.
Appendix – People Dashboard

Description – This dashboard contains all employee data including appointment, biographic, performance and evaluations, and benefits information for both paid and unpaid employees for all funding sources.

1. Current Status tab
   a. Purpose – this dashboard tab is designed to provide information for people with a current appointment, and includes appointment, salary and title data.

   b. Filters
      1) UB Entity Name – this dropdown field is used to identify an administrative area within the university. This field can be selected from the dropdown or the user is able to type the whole name in the area in order to obtain the entity that is being searched for. All Choices is provided so that there will be no limits placed on the results by UB Entity Name.
      2) UB Entity Number – this field is the number associated with that area in UB’s hierarchy chart.
      3) Person Number – this field is a unique University at Buffalo identification number automatically assigned to individuals affiliated with the University. It is generated by the system and cannot be changed.
      4) Line Number – this field is for state employees only, a unique number used to identify a particular position assigned to this campus.
      5) Name – this dropdown field is the name of the employee. This field can be selected from the dropdown or the user is able to type the whole name in the area in order to obtain the person that is being searched for. All Choices is provided so that there will be no limits placed on the results by Name.
      6) Last Name – the user can enter a partial last name of an employee that would appear at the beginning of this field.
      7) Appointment Type – this dropdown field indicates whether the employee is classified, professional, faculty, student, RF, UBF, etc. This field can be selected from the dropdown or the user is able to type the whole name of the appointment type in the area in order to obtain the value that is being searched for.

   c. Report Contents
      1) Current Status
         a) Purpose – The report that shows the employee information has a default sort on last name, but the page can be sorted by any column heading. You can also click on any person number to get more information on that particular individual.

         b) Navigation
            ➢ Individual Summary – this drilldown tab contains a summary of all appointment and biographic information for the selected person.
            ■ Person – this section provides a brief outline of the person’s biographic information.
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- UB Information – this section contains a brief description of person’s campus contact information and service dates.
- Appointment Summary – this section gives a short view of person’s most recent employment information, such as, appointment dates, job title and department.
- Salary History – this section shows the person’s entire salary history related to employment at UB
- Program and Evaluation Summary – this section shows the date information for a person’s programs and evaluations that have been received or still need to be completed.
- Salary Distribution – this section provides the account number, pay period and expenditure information related to the person’s salary history.

- Biographical Data – this drilldown tab provides a more comprehensive view of the person’s attributes, including demographics, education, and UB service dates.
  - Person – this section provides a brief outline of the person’s biographic information.
  - Address Information – this section shows both local and campus mailing addresses.
  - Degree Information – this section shows education level and degrees received.
  - Date Information – this section shows all State, SUNY, and UB service dates.
  - Emergency Contact Information – this section provides information on contacts supplied by the person to use in case of an emergency.

- Evaluation – this drilldown tab shows both program and evaluations submitted by the person’s department and those that are missing.
  - Person – this section provides a brief outline of the person’s biographic information.
  - Appointment Dates – this section shows the person’s most recent appointment begin and end date
  - Program – this section shows the dates related to the specific programs for this employee, and whether or not it has been received.
  - Evaluation – this section shows the dates related to the specific evaluations for this employee, and whether or not they have been received.

- Leave of Absence – this drilldown tab shows when the person was absent due to various types of leaves including Family Medical Leave, Sick Leave, etc.
  - Person – this section provides a brief outline of the person’s biographic information.
  - Leave of Absence – this section provides leave types and dates for any leaves that have been taken by this employee.

- Benefits – this drilldown tab shows the person’s selected health insurance and retirement options such as TIAA-CREF, ERS, or TRS.
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- Person – this section provides a brief outline of the person’s biographic information.
- Benefits – this section provides the person’s health insurance options, birth and service date, and retirement information.
- Appointment – this drilldown tab includes data on each appointment that the person has held at UB such as type, department, title, fte, and dates.
- Person – this section provides a brief outline of the person’s biographic information.
- Appointment – this section allows the user to get detailed information about each appointment held by the employee, and further details are provided by clicking on the magnifying glass.
- Salary History – this drilldown tab gives a detailed view of the employee’s compensation over time, including the reason for change, and amount of change.
- Person – this section provides a brief outline of the person’s biographic information.
- Salary History – this section shows the person’s base annual salary, also receives amounts, and actual salary amounts for their entire employment at UB.
- Extra Service – this drilldown tab shows if the person has had any additional appointments providing service above and beyond their primary appointment.
- Person – this section provides a brief outline of the person’s biographic information.
- Extra Service – this section provides information, such as, account number, amount, dates, UBF reference number, and extra service type.
- Salary Distribution – this drilldown tab shows the accounts that are charged for this person’s salary expenditures.
- Person – this section provides a brief outline of the person’s biographic information.
- Salary Distribution – this section provides the annual full time salary and fiscal allocation by account number for a particular fiscal year.
- Payroll Transactions – this section contains payroll dates, transaction type and expenditure information for each account number by fiscal year.
- Course Load – this drilldown tab shows information related to a faculty member’s teaching assignments by semester.
- Person – this section provides a brief outline of the person’s biographic information.
- Course Load – this section includes information on employee’s courses, credits, enrollment and building assignments for the current academic year.
- Accruals – this drilldown tab shows information related to the employee’s semi-annual vacation and sick time balances and timesheet information.
2. Appointment tab
   a. Purpose – This Dashboard tab is designed to provide information for people with a current appointment. The Appointment dashboard includes specific information related to a person’s appointment, including title, pay basis and commitment. This dashboard can be sorted on any field.

   b. Filters
      1) UB Entity Name – this field is the same as the Current Status tab description
      2) UB Entity Number – this field is the same as the Current Status tab description
      3) Person Number – this field is the same as the Current Status tab description
      4) Line Number – this field is the same as the Current Status tab description
      5) Name – this field is the same as the Current Status tab description
      6) Last Name – this field is the same as the Current Status tab description
      7) Appointment Type – this field is the same as the Current Status tab description

   c. Report Contents
      1) Appointments
         a) Purpose – The report that shows the employee appointment information has a default sort on last name, but the page can be sorted by any column heading. You can also click on any person number to get more information on that particular individual.

         b) Navigation – the following navigation is the same as the Current Status navigation description above
            ➢ Individual Summary
            ➢ Biographical Data
            ➢ Evaluation
            ➢ Leave of Absence
Strategic Information Reporting Initiative (SIRI)

- Benefits
- Appointment
- Salary History
- Extra Service
- Salary Distribution
- Course Load
- Accruals
- ePTF

3. Title tab
   a. Purpose – This Dashboard is designed to provide title information for people with a current appointment. The Title dashboard includes specific information related to a person's title, including official state title and in-house title. This dashboard can be sorted on any field.

   b. Filters
      1) UB Entity Name – this field is the same as the Current Status tab description
      2) UB Entity Number – this field is the same as the Current Status tab description
      3) Person Number – this field is the same as the Current Status tab description
      4) Line Number – this field is the same as the Current Status tab description
      5) Name – this field is the same as the Current Status tab description
      6) Last Name – this field is the same as the Current Status tab description
      7) Appointment Type – this field is the same as the Current Status tab description

   c. Report Contents
      1) Title
         a) Purpose – The report that shows the employee title information has a default sort on last name, but the page can be sorted by any column heading. You can also click on any person number to get more information on that particular individual.

         b) Navigation – the following navigation is the same as the Current Status navigation description above
            - Individual Summary
            - Biographical Data
            - Evaluation
            - Leave of Absence
            - Benefits
            - Appointment
            - Salary History
            - Extra Service
            - Salary Distribution
            - Course Load
            - Accruals
            - ePTF
4. Dates tab
   a. **Purpose** – This Dashboard is designed to provide date information for people with a current appointment. The Dates dashboard includes specific information related to a person’s date of expected permanent appointment and non-renewal date. This dashboard can be sorted on any field.

   b. **Filters**
      1) UB Entity Name – this field is the same as the Current Status tab description
      2) UB Entity Number – this field is the same as the Current Status tab description
      3) Person Number – this field is the same as the Current Status tab description
      4) Line Number – this field is the same as the Current Status tab description
      5) Name – this field is the same as the Current Status tab description
      6) Last Name – this field is the same as the Current Status tab description
      7) Appointment Type – this field is the same as the Current Status tab description

   c. **Report Contents**
      1) **Dates**
         a) **Purpose** - The report that shows the employee date information has a default sort on last name, but the page can be sorted by any column heading. You can also click on any person number to get more information on that particular individual.

         b) **Navigation** – the following navigation is the same as the Current Status navigation above
            - Individual Summary
            - Biographical Data
            - Evaluation
            - Leave of Absence
            - Benefits
            - Appointment
            - Salary History
            - Extra Service
            - Salary Distribution
            - Course Load
            - Accruals
            - ePTF

5. Financial tab
   a. **Purpose** – This Dashboard is designed to provide financial information for people with a current appointment. The Financial dashboard includes specific information related to a person’s account number, fiscal FTE, annual fulltime salary, allocation, encumbrance and expenditure. This dashboard can be sorted on any field.

   b. **Filters**
      1) UB Entity Name – this field is the same as the Current Status tab description
Strategic Information Reporting Initiative (SIRI)

2) UB Entity Number – this field is the same as the Current Status tab description
3) Person Number – this field is the same as the Current Status tab description
4) Line Number – this field is the same as the Current Status tab description
5) Name – this field is the same as the Current Status tab description

c. Report Contents

1) Financial
   a) Purpose - The report that shows the employee financial information has a default sort on last name, but the page can be sorted by any column heading. You can also click on any person number to get more information on that particular individual. It can be further limited by fiscal year.

   b) Navigation – the following navigation is the same as the Current Status navigation description above
      ➢ Individual Summary
      ➢ Biographical Data
      ➢ Evaluation
      ➢ Leave of Absence
      ➢ Benefits
      ➢ Appointment
      ➢ Salary History
      ➢ Extra Service
      ➢ Salary Distribution
      ➢ Course Load
      ➢ Accruals
      ➢ ePTF

6. Supervisor tab

a. Purpose – This Dashboard is designed to provide supervisor information for people with a current appointment. The Supervisor dashboard includes the person number of a person’s supervisor as well as the supervisor name. This dashboard can be sorted on any field

b. Filter
   1) UB Entity Name – this field is the same as the Current Status tab description
   2) UB Entity Number – this field is the same as the Current Status tab description
   3) Person Number – this field is the same as the Current Status tab description
   4) Line Number – this field is the same as the Current Status tab description
   5) Name – this field is the same as the Current Status tab description
   6) Last Name – this field is the same as the Current Status tab description
   7) Appointment Type – this field is the same as the Current Status tab description
Strategic Information Reporting Initiative (SIRI)

c. Report Contents

1) Supervisor
   a) Purpose - The report that shows the employee supervisor information has a default sort on last name, but the page can be sorted by any column heading. You can also click on any person number to get more information on that particular individual.

   b) Navigation – the following navigation is the same as the Current Status navigation description above
      ➢ Individual Summary
      ➢ Biographical Data
      ➢ Leave of Absence
      ➢ Benefits
      ➢ Appointment
      ➢ Salary History
      ➢ Extra Service
      ➢ Salary Distribution
      ➢ Course Load
      ➢ Accruals
      ➢ ePTF

7. Salary tab
   a. Purpose – This Dashboard is designed to provide salary information for people with a current appointment. The Salary dashboard includes salary and service date information, as well as, in-house title and pay basis data. This dashboard can be sorted on any field.

   b. Filters
      1) UB Entity Name – this field is the same as the Current Status tab description
      2) UB Entity Number – this field is the same as the Current Status tab description
      3) Person Number – this field is the same as the Current Status tab description
      4) Line Number – this field is the same as the Current Status tab description
      5) Name – this field is the same as the Current Status tab description
      6) Last Name – this field is the same as the Current Status tab description
      7) Appointment Type – this field is the same as the Current Status tab description

   c. Report Contents
      1) Salary
         a) Purpose - The report that shows the employee salary information has a default sort on last name, but the page can be sorted by any column heading. You can also click on any person number to get more information on that particular individual.

         b) Navigation – the following navigation is the same as the Current Status navigation description above
Strategic Information Reporting Initiative (SIRI)

- Individual Summary
- Biographical Data
- Evaluation
- Leave of Absence
- Benefits
- Appointment
- Salary History
- Extra Service
- Salary Distribution
- Course Load
- Accruals
- ePTF

8. Programs/Evaluations tab

**Purpose** – This Dashboard is designed to provide information for people with a current appointment regarding their programs and evaluations that have been submitted or are still missing. The Programs/Evaluations dashboard includes seven years worth of data. This dashboard can be sorted on any field.

a. Filters
   1) UB Entity Name – this field is the same as the Current Status tab description
   2) UB Entity Number – this field is the same as the Current Status tab description
   3) Person Number – this field is the same as the Current Status tab description
   4) Line Number – this field is the same as the Current Status tab description
   5) Name – this field is the same as the Current Status tab description
   6) Negotiating Unit – this field provides the description of the numeric code identifying the union that represents an individual or category of appointment types for those individuals represented by a union.

b. Report Contents
   1) Programs
      a) Purpose - The report that shows the employee program information has a default sort on last name, but the page can be sorted by any column heading. You can also click on any person number to get more information on that particular individual.

   2) Evaluations
      a) Purpose - The report that shows the employee evaluation information has a default sort on last name, but the page can be sorted by any column heading. You can also click on any person number to get more information on that particular individual.

9. ePRT tab

a. **Purpose** – This Dashboard is designed to provide information for people with a current appointment regarding their supervisor, and designations for faculty definition and designations as a department head, as well as, job title data.
Strategic Information Reporting Initiative (SIRI)

b. Filters
   1) UB Entity Name – this field is the same as the Current Status tab description
   2) UB Entity Number – this field is the same as the Current Status tab description
   3) Person Number – this field is the same as the Current Status tab description
   4) Line Number – this field is the same as the Current Status tab description
   5) Name – this field is the same as the Current Status tab description
   6) Last Name – this field is the same as the Current Status tab description
   7) Appointment Type – this field is the same as the Current Status tab description

c. Report Contents
   1) ePRT
      a) Purpose – The data is downloaded from the ePRT system. If changes are made in ePRT they should be reflected on this tab in SIRI. The report that shows the employee information has a default sort on last name, but the page can be sorted by any column heading. You can also click on any person number to get more information on that particular individual.
      b) Navigation – the following navigation is the same as the Current Status navigation description above
         ➢ Individual Summary
         ➢ Biographical Data
         ➢ Evaluation
         ➢ Leave of Absence
         ➢ Benefits
         ➢ Appointment
         ➢ Salary History
         ➢ Extra Service
         ➢ Salary Distribution
         ➢ Course Load
         ➢ Accruals
         ➢ ePTF

10. Line History tab
   Purpose – This Dashboard is designed to provide historical line number information. The Line History dashboard includes all appointment information for each person that occupied a specific line number. This would include title, department, appointment type and term, pay basis, dates and appointment change reason. This dashboard can be sorted on any field.

   a. Filters
      1) Line Number – this field is the same as the Current Status tab description

   b. Report Contents
      1) Line History
Strategic Information Reporting Initiative (SIRI)

a) Purpose - The report that shows the employee line history information has a default sort on last name, but the page can be sorted by any column heading.

11. Historical Appointments tab
a. Purpose – This Dashboard is designed to provide historical appointment information. The Historical Appointments dashboard includes all appointment information for a person for each of the appointments that they have held, such as, appointment type, title, department, dates and actual salary. This dashboard can be sorted on any field.

b. Filters
1) UB Entity Name – this field is the same as the Current Status tab description
2) UB Entity Number – this field is the same as the Current Status tab description

c. Report Contents
1) Historical Appointments
   a) Purpose - The report that shows the employee historical appointment information has a default sort on last name, but the page can be sorted by any column heading. You can also click on any person number to get more information on that particular individual.
   b) Navigation – the following navigation is the same as the Current Status navigation description above
      ➢ Individual Summary
      ➢ Biographical Data
      ➢ Evaluation
      ➢ Leave of Absence
      ➢ Benefits
      ➢ Appointment
      ➢ Salary History
      ➢ Extra Service
      ➢ Salary Distribution
      ➢ Course Load
      ➢ Accruals
      ➢ ePTF

12. Non-Current Employees tab
   Purpose – This Dashboard is designed to provide appointment information for employees that no longer have a current appointment. The Non-Current Employees dashboard includes biographic and service date information for appointments that are no longer current. This dashboard can be sorted on any field.

a. Filters
   1) Person Number – this field is the same as the Current Status tab description
   2) Last Name – this field is the same as the Current Status tab description
b. Report Contents
   1) Non-Current Employees
      a) Purpose - The report that shows the non-current employee information has a default sort on last name, but the page can be sorted by any column heading. You can also click on any person number to get more information on that particular individual.

      b) Navigation
         ➢ Appointment – this drilldown tab includes data on each appointment that the person has held at UB such as type, department, title, fte, and dates.
            ■ Person – this section provides a brief outline of the person’s biographic information.
            ■ Appointment – this section allows the user to get detailed information about each appointment held by the employee, and further details are provided by clicking on the magnifying glass.
         ➢ Salary History – this drilldown tab gives a detailed view of the employee’s compensation over time, including the reason for change, and amount of change.
            ■ Person – this section provides a brief outline of the person’s biographic information.
            ■ Salary History – this section shows the person’s base annual salary, also receives amounts, and actual salary amounts for their entire employment at UB.

13. Reports: These reports can be used to run listings for your departments on specific data points such as appointment type, title, salary, DEPA dates, and appointment end dates.

   a. Purpose – The list of these reports can be found on the Info tab of the People dashboard. The current list includes:

   | All Employees by Unit |
   | Appointment End Date |
   | Appointment Type |
   | Bargaining Unit affiliation |
   | DEPA Dates |
   | Department Profile |
   | Employee Profile & Demographics by Unit |
   | Leave History |
   | Non-Renewal Date Report |
   | Official Job Title |
   | Salaries |
   | Service Dates |

Most reports have their own set of prompts where the user can identify the specifics of information to be displayed when running the report. For example, the All Employees by Unit report prompts for Level 1 of the unit, Level 2 of the unit, Level 3 of the unit, and Employer. Another example would be the Appointment Type report which prompts for Level 1, Level 2, Level 3, Appointment Type, and Appointment End Date.
After the report results are displayed, the user can *Print* or *Download* the report, and can go back to the list of reports by clicking on the *Return* link.
PEOPLE FAQ'S

Q: Where can I find information on employees that no longer have an active appointment?
A: On the “Non-Current Employees” tab.

Q: I need to see information for Faculty only, how can I limit the results?
A: Select the appointment type of “Faculty” from the Selection Pane and the page will update showing only Faculty appointments for the data that you have access to.

Q: How can I view information about an individual in the People Dashboard?
A: Use the individual's person number or name in the Selection Pane and the page will update with just that person’s information. If you left click on the person number you will be able to view more detailed employment information about that individual.

Q: Why can’t I see any data on the Financial Tab within the People Dashboard?
A: You must have Financial Data access in order to view information on this tab. It is a summary of the information you would find on the Money Dashboard. Contact the Financial Data Trustee for access.

Q: What do I do if I see information that is incorrect?
A: Contact the Appointment Processing unit of University Human Resources at 645-7777 and they will let you know what needs to be done to correct the information. The process will vary based on the type of information that needs to be fixed.

Q: What is the ePRT tab on the People Dashboard and how do I correct the information?
A: ePRT is what was previously known as Faculty Definition. You must request access to this system from University Human Resources. It is intended for the department to maintain accurate information on supervisor’s and department head designation. You can also use ePRT to make designations for faculty members. This information can be updated directly in ePRT or by using an ePTF (Electronic Personnel Transaction Form).

Q: Can I create my own reports in SIRI?
A: No, at this time any report requests should be sent to University Human Resources so that they can be incorporated into SIRI. You can however, use the sorting and filtering tools in SIRI to narrow your results and download the information to excel in order to manipulate it, which will often times give you the information that you are looking for.
Appendix – Procurement Dashboard

Description – This dashboard includes procurement data for RF, State and UBF funding sources. Tabs found in this area include eReq transactions, Inventory assets, Procurement Card transactions, RF/State/UBF payments and various reports for eReq, Inventory and P-Card.

1. eReq Summary tab
   a. Purpose – The report is designed to provide summary information on all Purchase Orders, NPOR’s (no purchase order required), Buyer P-Card, Requisitions, Contracts and Cancelled orders entered into and processed by the eReq system. The data is updated nightly. When first coming to this tab, it may take awhile to return results.

   b. Filters
      1) Funding Source – this dropdown allows the user to choose between the 3 sources of funds – State, Research Foundation (RF) and UB Foundation (UBF). State is the default value. All Choices is provided so that there will be no limits placed on the results by funding source.
      2) Order Status – this dropdown allows the user to select the type of eReq transaction, such as, Purchase Order, NPOR, Contract, etc. All Choices is provided so that there will be no limits placed on the results by order status.
      3) State Fiscal Year – this dropdown allows the user to choose between various State fiscal years. Funding Source should be selected as State when using this filter. The 2010-2011 state fiscal year is the default value. All Choices is provided so that there will be no limits placed on the results by state fiscal year.
      4) Completion Date – the user can enter an eReq completion date between two dates. This would mark the end of the transaction and workflow process. A calendar is provided for each date so that the date can be selected, or the user can manually enter the dates using the format MM/DD/YYYY.
      5) Account Number – this number is a unique set of numbers identifying a specific funding allocation for accumulating all expenditures. If the Funding Source filter is State, then this would be the 10-digit State account number. If the Funding Source is UBF, then this would be the 10-digit UBF Account Number.
      6) RF Project Number – this number is a portion of the RF account number representing the Project. The funding source must be equal to RF. This field may be entered by itself to query on all tasks and awards for a particular project, or it will be entered with the following two RF fields to specify a particular RF Account Number.
      7) RF Task Number – this number is entered with the other two portions of the RF Account Number – project and award.
      8) RF Award – this number is the final portion of the RF account number representing the Award. It may be entered by itself or part of the entire RF account number.
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9) State Contract Number – this number represents a contract number designated by the Office of General Services (OGS). The user enters a partial set of characters that represent the beginning of the State Contract Number.

10) Supplier – the dropdown allows the user to select a particular vendor who has been identified with an eReq transaction. All Choices is provided so that there will be no limits placed on the results by the supplier field.

11) Incident Number – the user can enter this eReq generated number used for tracking purposes prior to the approval step. All eReq transactions have an incident number.

12) Purchase Order Number – the user can enter this number if the eReq transaction has completed the PO process. NPOR’s do not have a Purchase Order Number.

13) Requisition Number ID – the user can enter this number for those eReq transactions that have been approved by the campus and/or are NPOR’s. The State PO number and Requisition number are the same.

14) Department Requisition Number – the user could enter this field if the department has assigned an internal department identification number to a particular eReq transaction.

15) Department Use – the user can enter this field if the department has used this optional field to maintain internal record keeping. The field is not case-sensitive, and it refers to one of 2 fields – Department Use 2 or Department Use 3.

c. Report Contents
   1) eReq
      a) Purpose – this report provides header information on transactions processed by the eReq system. The user is able to get a printout of the eReq Summary report (actual purchase order information), as well as, line item details for any particular header record. It is sorted in Account Number order and then Incident Number order.

2. eReq Order Details tab
   a. Purpose – The report is designed to provide detail line item information on all Purchase Orders, NPOR’s, Buyer P-Card, Requisitions, Contracts and Cancelled orders entered into and processed by the eReq system. The data is updated nightly.

   b. Filters
      1) Funding Source – this field is the same as the eReq Summary description
      2) Order Status – this field is the same as the eReq Summary description
      3) State Fiscal Year – this field is the same as the eReq Summary description
      4) Completion Date – this field is the same as the eReq Summary description
      5) Account Number – this field is the same as the eReq Summary description
      6) RF Project Number – this field is the same as the eReq Summary description
      7) RF Task Number – this field is the same as the eReq Summary description
      8) RF Award Number – this field is the same as the eReq Summary description
      9) State Contract Number – this field is the same as the eReq Summary description
Strategic Information Reporting Initiative (SIRI)

10) Supplier – this field is the same as the eReq Summary description
11) Incident Number – this field is the same as the eReq Summary description
12) Purchase Order Number – this field is the same as the eReq Summary description
13) Requisition Number ID – this field is the same as the eReq Summary description
14) Department Requisition Number – this field is the same as the eReq Summary description
15) Item Description – the user may enter this field which is the detailed description of each item ordered. The value that is entered can be a partial value located anywhere in the entire line item description field.
16) Department Use – the user can enter this field if the department has used this optional field to maintain some internal record keeping. This field is no case-sensitive and refers to the Department Use 1 field.

c. Report Contents
   1) eReq Order Details
      a) Purpose – this report provides detailed line item information on transactions processed by the eReq system. It is sorted in Incident Number order and includes detailed item descriptions and commodity data.

3. Inventory tab
   a. Purpose – this report provides a detail listing of assets that are owned and monitored by the various departments on campus. It contains detailed descriptions, asset numbers, account numbers, location and original cost among other types of information. It is updated nightly.

   b. Filters
      1) Account Number – this field is the inventory account number assigned to each department and is not necessarily the account number used to purchase the equipment.
      2) RF Agency – this dropdown field is to be used for RF assets only and it is the primary award number used to purchase the RF equipment. All Choices is provided so that there will be no limits placed on the results by the RF Agency field.
      3) Manufacturer – this dropdown field contains the names of those companies who manufactured the assets. All Choices is provided so that there will be no limits placed on the results by the manufacturer field.
      4) Serial Number – the user may use this field to query on a specific asset having this serial number.
      5) Original Cost – this field is the initial cost of purchasing the asset. The amount entered will test for any costs that are greater than or equal to the value entered in the filter.
      6) Purchase Order Number – the user can filter this report by the eReq Purchase Order Number that was used to purchase the asset.
      7) Department – this dropdown field identifies the UB department where the asset is located. All Choices is provided so that there will be no limits placed on the results by the Department field.
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8) Building – this dropdown field identifies which building the asset is located in. All Choices is provided so that there will be no limits placed on the results by the Building field.

9) Room – this dropdown field is the room number in the building where the asset is located. All Choices is provided so that there will be no limits placed on the results by the Room field.

10) Asset Number – this is a 10 digit number starting with 03 that uniquely identifies the tagged asset.

11) Class – this dropdown field represents the equipment classification code assigned to assets in the Property Control System. All Choices is provided so that there will be no limits placed on the results by the class field.

12) Condition – this dropdown field contains the description of the current level of utility status of the assets being sought. Examples include Excellent, Good, Fair, etc. All Choices is provided so that there will be no limits placed on the results by the Condition field.

13) Status – this dropdown allows the user to select the appropriate operating status of the asset, such as, Active & In Use, Under Repair, In Storage, etc. All Choices is provided so that there will be no limits placed on the results by the status field.

14) Description-Full – the user can enter the partial group of words that are part of the description of the asset(s) that is(are) being sought. It must be entered in all CAPS.

15) Model – this dropdown field can be used to query on the manufacturer’s model number of the assets being sought. All Choices is provided so that there will be no limits placed on the results by the Model field.

16) Acquisition Date – this dropdown field represents the date the asset was acquired or received. It is formatted YYYYMM. All Choices is provided so that there will be no limits placed on the results by the acquisition date field.

17) Office of General Services Code – this dropdown field contains the OGS code assigned to various assets. All Choices is provided so that there will be no limits placed on the results by the Office of General Services Code field.

c. Report Contents
   1) Inventory
      a) Purpose – this report provides details on all assets monitored by UB departments. It is sorted in Account Number order and the Asset Number order.

4. Procurement Card tab
   a. Purpose – This report provides a detail list of all purchases and credits made on Procurement Cards (P-Cards). It includes such data as account number, Purchase/Credit amount, item description, vendor and card holder name. The data is updated nightly. When first opening this tab, it may take awhile to return results.

   b. Filters
      1) Account Number – this is the account number associated with the P-Card.
Strategic Information Reporting Initiative (SIRI)

2) Vendor Name – this is a dropdown containing the supplier that was used for a purchase using the P-Card. All Choices is provided so that there will be no limits placed on the results by the Vendor Name field.

3) Voucher Number – this is the number assigned to the document created for the expenditure on a P-Card.

4) Card Holder Name – this dropdown field specifies the person who is responsible for the P-Card. All Choices is provided so that there will be no limits placed on the results by the Card Holder Name field.

5) Card Account Number – this is a dropdown that begins with an “X” and followed by the last 2 digits of the Card Holder’s P-Card Number. All Choices is provided so that there will be no limits placed on the results by the Card Account Number field.

6) Transaction Type – this dropdown contains the two different types of P-Cards – Visa (State) and Amex (RF). All Choices is provided so that there will be no limits placed on the results by the Transaction Type field.

7) Purchase Date – this is the date on which the P-Card transaction was processed. The user would enter 2 dates between which they are querying. They can use the calendars that are provided or manually enter the two dates using the format MM/DD/YYYY.

8) Reconciliation Cycle Number – this dropdown field is a four-digit number that signifies the month and year of the P-Card reconciliation using the format MMYY. All Choices is provided so that there will be no limits placed on the results by the Reconciliation Cycle Number field.

9) Fiscal Year – this dropdown contains the fiscal year of the P-Card purchase, such as, 2010-2011. All Choices is provided so that there will be no limits placed on the results by the Fiscal Year field.

10) Purchase Amount – this filter contains two dollar numbers between which the dollar value of the P-Card transaction falls. For entering a credit amount, put a minus sign in front of the number entered.

c. Report Contents

1) Procurement Card

   a) Purpose – This report which contains detail P-Card transactions can be used to aid in account reconciliation. It is sorted in Account Number order, Card Holder Name order, Purchase Date order and finally Voucher Number order.

5. State Payments tab

   a. Purpose – this report provides detailed information regarding payments to vendors and individuals from State Funds. It includes such information as Account Number, Charge Amount, Check Date, Check Number, Check Amount and various Voucher data.

   b. Filters

      1) Fiscal Year – this dropdown contains the state fiscal year when the payment was made. It is defaulted to 2010-2011. All Choices is also provided so that there will be no limits placed on the results by the Fiscal Year field.
Strategic Information Reporting Initiative (SIRI)

2) Account Number – the user can enter a partial State account number associated with this payment. The number is the beginning of the account number.

3) Invoice Number – this field contains either numbers of the invoice for, such as, a Purchase order, or a name in the case of a P-Card payment, or the word “travel” in the case of Travel payments. The field is not case-sensitive and the information entered can be contained in any part of the Invoice Number field.

4) NPOR Requisition/Speed Order Number – the user can enter either the NPOR (no PO required) Requisition number or the Speed Order Number of a payment. A partial number can be entered which would appear at the beginning of this field.

5) Voucher Number – this field contains the number of the payment voucher used to make the state payment. P-Card begins with a “P” followed by numbers, for example, where a Purchase Order is all numbers. A partial number can be entered that represents the beginning of the field.

6) PO/Contract/Requisition Indicator – this dropdown indicates the type of number that is entered in filter # 7, ie. Purchase Order, Contract or Requisition. All Choices is provided so that there will be no limits placed on the results by the PO/Contract/Requisition Indicator field.

7) PO/Contract/Requisition Number – the user can search on one of these 3 identification numbers. The PO/Contract/Requisition Indicator field will identify what type of number is entered here.

8) Payee Name – this field is the Payee Name 1 field to whom the payment was made. It is not case-sensitive, and a partial name may be entered and be contained in any part of the field.

9) OEC Code – this dropdown field contains the code for the Object of Expenditure value. All Choices is provided so that there will be no limits placed on the results by the OEC Code field.

10) Trial Balance – this dropdown field contains all of the State Trial Balance values – what type of funds being paid. All Choices is provided so that there will be no limits placed on the results by the Trial Balance field.

11) Voucher Date – this field is the date associated with the creation of the Voucher. Two dates are entered such that any date between these dates will be selected. The user may use the calendars that are provided, or may enter them in the formats of MM/DD/YYYY.

12) Check Date – this field asks for two dates between which the date the Check was written shall occur.

13) Charge Amount – this field is the dollar amount that was charged to the Account for this state payment. If the user is checking for a negative number, a minus sign would be put before the dollar amount.

c. Report Contents

1) State Payments
   a) Purpose – this report contains State payment information for such transactions as Purchase Orders, Petty Cash, Travel, Speed Orders, NPOR’s and Procurement Cards. It is sorted in Voucher Date order, Voucher Number order and Account Number order.
b) Navigation

- State Payments Payee Information – when the user clicks on the Voucher Number on the original report screen, a second screen is displayed containing Payee name and address information, as well as, check information, OEC code used and its corresponding Object of Expenditure description. One line will appear for every account number that is charged.

6. RF Payments tab

a. Purpose – this report will display all payments to vendors and individuals from Research Foundation funds. It includes such information as RF Account Number, Description, Purchase Order Number, Amount and Supplier. It also includes Amount Paid and Balance to be paid on a Purchase Order.

b. Filters

1) Project Number – this field represents the Project portion of the RF account number. It can be entered by itself to capture all accounts using this project, or it may be combined with the Task and Award fields to find a specific RF Account Number.

2) Task Number – this field is part of the RF Account Number.

3) Award Number – this field is part of the RF Account Number. It may be entered by itself to get all of the projects that are associated with this award or it may be combined with the Project and Task fields to find one specific RF Account Number.

4) Expenditure Category – this dropdown field is a general classification that groups similar payment items or types of expenditures. All Choices is provided so that there will be no limits placed on the results by the Expenditure Category field.

5) Purchase Order Number – the user can enter the Purchase Order number from the eReq system that was paid by this RF payment.

6) Description – this field contains a detailed description of the item that was paid for. An entry may be made that represents a portion of the description information in any part of the field.

7) Supplier – this field contains the name of the Supplier that was paid by this RF payment. An entry may be made that represents a portion of the Supplier name in any part of the field.

c. Report Contents

1) RF Payments
   a) Purpose – This report contains RF payment information and is sorted in Account Number order and Expenditure Category order.

7. UBF Payments tab

a. Purpose – this report will display all payments to vendors and individuals from UB Foundation funds. It includes such information as Account Number, Disbursement Number, Check Amount, and Credit/Debit Amounts.

b. Filters
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1) Account Number – the user may enter the 10 digit UB Foundation Account Number in this field.

2) Transaction Description – this field contains a detailed description of the item that was paid for. An entry may be made that represents a portion of the description information in any part of the field. Specifically, it is the vendor name or the UBF journal entry description when the entry is JV.

3) Vendor Name – this field is the name of the Vendor that was paid by this UBF payment. An entry may be made that represents a portion of the Vendor Name in any part of the field.

4) Disbursement Number – this field is the UBF Disbursement request number or journal entry reference number.

5) Check Number – this field is the number of the check that was used to make the UBF payment.

6) Transaction Date – this field is the date on which the transaction was processed. Two dates are entered between which this date must fall. Calendars are provided to select the date filters or the dates can be entered manually using the MM/DD/YYYY format.

c. Report Contents

1) UBF Payments
a) Purpose – This report contains UBF payment information and is sorted in Transaction Date order and Account Number order.

8. Reports tab
a. Purpose – These are specified reports for each of the three types of Procurement data. eReq provides reports on Purchase Orders – for example, PO’s Over Dollar Amount by funding source. Inventory provides two reports describing asset details and depreciation. Procurement Card provides reports on P-Card activity – for example, by Account Number. The data is updated nightly. Each report has its own filter or prompt criteria.
PROCUREMENT FAQ's

Q. Why do “no results” show at times when I use multiple filters?
A. If your filters conflict then “no results” will show. Try taking out one of your filters and you should get results.

Q. I have RF Money access but I cannot see any of the expenditures in Procurement for RF?
A. RF is different from State in the sense that you do not receive procurement access when you receive Money access. You must request this separately through Michelle Murphy.

Q. How current is the data in the procurement screens?
A. Data is updated nightly following the Infosource schedule.

Q. What is the difference between the OTPS screen in Money and the State payments screen in Procurement?
A. OTPS screen has encumbrances, IDI transactions and Pcard transactions which do not show up in the State payment screens in Procurement.
Appendix – Money Dashboard

Description - This dashboard includes financial data for State, RF, and UBF funding sources. Tabs found in this area include Account, Fund, Line, Budget Revisions, OEC and FTE, IFR Fees, IFR Salary Recovery, Reports and General Information.

1. Account tab
   a. **Purpose** This report is designed to provide summary information by account which includes FTE, Net Revenue, Allocation, Encumbrance, Expenditure and Free Balance. Totals are shown by Trial Balance. This information is updated depending upon whether it is revenue and expenditures. Update information is shown on the Information tab.

   b. **Filters**
      1) Fiscal Year - Fiscal Year – this dropdown allows the user to choose between various fiscal years. The current fiscal year is the default value.
      2) UB Entity Name - this dropdown field is used to identify an administrative area within the university. This field can be selected from paging down the dropdown list or the user is able to start typing the name in the dropdown and this will automatically bring them to the name they are searching for. All Choices is provided so that there will be no limits placed on the results by UB Entity Name.
      3) UB Entity Number - this field is the 4 digit number associated with that area in UB’s hierarchy chart.
      4) State Account Number – this field can have either a partial or entire State account number keyed in. State accounts are defined as accounts in the following trial balances: State Operating, IFR, SUTRA, State Endowment, ILF and DIFR.
      5) Trial Balance - this dropdown field contains all of the State Trial Balance values – what type of funds that the accounts are held in. All Choices is provided so that there will be no limits placed on the results by the Trial Balance field.
      6) RF Project – seven digit number that is the project portion of the Research Foundation account number. When using this field, the user can leave the Task and Award fields blank.
      7) RF Task – this is an alpha numeric field that is usually a one digit number. This is the task portion of the Research Foundation account number. When using this field, the user can leave the Project and Award fields blank.
      8) RF Award - number that is the award portion of the Research Foundation account number. When using this field, the user can leave the Task and Project fields blank. If the account has them, leading zeros must be used or No results will be returned.
      9) RF Trial Balance - this dropdown field contains all of the RF Trial Balance values – what type of funds that the accounts are held in. All Choices is provided so that there will be no limits placed on the results by the Trial Balance field.
      10) UBF Account Number – a ten digit number that represents the UB Foundation account. All ten digits must be entered in order to obtain results.
c. Report Contents

1) State Accounts

a) Purpose – This section is designed to provide the budgeted amounts, expenditures, encumbrances, free balance, cash balances and FTE for a departments State accounts.

b) Navigation

➢ Account Summary - this drilldown tab contains a summary of all types of expenditures that are on a particular account. This is shown in 4 sections sorted by OEC.
   ▪ Summary – this section gives a one time summary of the account. It contains the same information as the Account tab that was drilled into when getting to this screen.
   ▪ Personal Service Regular- this section summarizes personal service expenditures by OEC code.
   ▪ Temporary Service – this section summarizes temporary service expenditures by OEC code.
   ▪ OTPS – this section summarizes other than personal service expenditures by OEC code.
   ▪ Staff Benefits - this section summarizes expenditures for staff benefits for the OEC codes in the 08000 range. It will be rare to have information in this section.

➢ Temporary Service – this section provides the user with information on their temporary service payroll for a specific account.
   ▪ Line Summary – this section summarizes the temporary service employee by line number. This includes their title code, salary and encumbrances.
   ▪ Transaction Summary – this section presents the temporary service payroll by date of the transaction.
   ▪ Transaction Detail – this section presents the temporary service payroll by person per pay period.
   ▪ OEC Totals - this section summarizes temporary service payroll transactions by OEC code.

➢ Personal Service Regular – this section provides the user with information on their personal service payroll for a specific account.
   ▪ PSR Summary – this section shows the employees who are being paid off of this account with their salary and expenditure information.
   ▪ PSR Transactions – this section shows the payroll expenditures by pay period for this account.
   ▪ Transaction Detail – this section shows the payroll detail that goes into each pay period for this account.
   ▪ OEC Totals - this section summarizes personal service payroll transactions by OEC code.

➢ OTPS – this section provides the user with information on their other than personal service transactions for a specific account.
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- Transactions – this section shows all OTPS transactions for this account. This information can be further filtered by date using the calendar filter at the top of the section.

- Budget Revisions - this section provides the user with information on their budget revisions for a specific account.
  - Applied Budget Revisions – this section shows the budget revisions that have been applied to the account.
  - Unapplied Budget Revisions - this section shows the future budget revisions that have not yet been applied to the account but will be applied in the future.

- IFR Account - this section provides the user with information on their revenue transactions for a specific account.
  - Sources and Uses – this section summarizes the components that make up the cash balance of an account.
  - Fees - this section summarizes the fees that are charged to various campus departments or students and the charged amount will be deposited into this account.
  - Revenue Transactions – this section shows all of the revenue transactions for this account. These transactions also include GUSF fees, salary recovery fees and fringes that may be subtracted from this account. This information can be further filtered by date using the calendar filter at the top of the section.
  - Salary Recovery – this section shows the employee that is having salary recovery deposited into this specific account for the grant number shown in this report.

- Endowment Account - this section provides the user with information on their Endowment transactions for a specific account. This is for State Endowment only; therefore this tab will only display data for State Endowment account transactions prior to the fiscal year ended June 2009. The legal opinions are attached in the first section.
  - Unallocated Balance – this section shows the amount available for expenditure but not budgeted as of a certain date.
  - Endowment Principal – this section shows the market and book value of the endowment. This is not the expendable amounts, just the endowment value.
  - Transactions – this section shows the transactions that are posted against a specific endowment account.
  - Summary Activity Transactions – this section summarizes the transactions by description.

- Procurement Card - this section provides the user with information on their procurement card transactions for a specific account.
  - Transactions – this section shows all of the P-card transactions that have been posted against a specific account.

- eReq - this section provides the user with information on their eReq transactions for a specific account.
  - eReq Transactions – this section shows all of the eReq transactions posted against a specific account.
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- ePTF - this section provides the user with information on their ePTF transactions for a specific account
  - ePTF Transactions – this section shows all of the ePTF transactions posted against a specific account.

2) Research Foundation Accounts

a) Purpose - This section is designed to provide the budgeted amounts, expenditures, encumbrances and available balance for various RF accounts.

b) Navigation

- Account Summary - this drilldown tab contains information on a specific account. This includes history, authorized signatures, details on the account, graphs and budget information.
  - Account Details – this section outlines the account type, purpose, budget and available balance of a particular account.
  - Authorized Signatures – this section provides the authorized signatures that are assigned to the particular account.

3) UB Foundation Accounts

a) Purpose - This section is designed to provide the expenditures, encumbrances, net revenues and ending balance for various UBF accounts.

b) Navigation

- Account Summary - this drilldown tab contains information on a specific account. This includes history, authorized signatures, details on the account, graphs and budget information.

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- Account History – this section provides a summary of the financial information of the account for previous years through the current year. A graph of the financial data is to the right of the table.
- Open Encumbrances – this section provides the amount of open encumbrances on the account by expenditure type.
- Budget Transactions – this section outlines the budget transactions that have occurred on the account and shows historical as well as current information.
  - Expense Transactions - this section provides detailed information regarding expenditures that are charged to a specific account.
  - Budget Transactions - this section outlines the budget transactions that have occurred on the account and shows historical as well as current information.
  - Transactions - this section shows all expenditure transactions for a specific account. This includes salary and fringe transactions and can be further filtered by date using the calendar filter at the top of the section.
- Revenue Transactions - this section provides detailed information regarding revenue transactions that are posted to a specific account.
  - Revenue Transactions - this section provides detailed information regarding revenue transactions that are posted to a specific account.
  - Transactions - this section shows all revenue transactions for a specific account and can be further filtered by date using the calendar filter at the top of the section.
- Payroll Transactions - this section provides detailed information regarding payroll transactions that are posted to a specific account.
  - Payroll Transactions - this section provides detailed information regarding payroll transactions that are posted to a specific account.
  - Transactions - this section shows payroll by pay period by employee and is totaled by check date. The information can be further filtered by check date using the calendar filter at the top of the section.
- Encumbrances - this section provides detailed information regarding encumbrances that are posted to a specific account and is broken down by category.
  - UBF Payroll Encumbrances – this section shows the encumbrances for the payroll of the UBF employee being paid from the specific account.
  - RF Payroll Encumbrances – this section shows encumbrances for RF employees working on UBF grants.
  - Petty Cash/Imprest Encumbrances – this section shows who has a petty cash bank or imprest custodial account open through the particular account.
  - Advance Encumbrances – this section shows who has open advances against a specific account and the amount of cash returned on that advance.
  - Loan Encumbrances – this section shows the original loan amount against a specific account and the current loan balance.
  - Special Encumbrances – this section shows reserved amounts for special situations against the particular account and what the balance is.
  - Purchase Order Encumbrances – this section shows encumbrances on purchase orders historically.

2. Fund tab
a. **Purpose** - This report is designed to provide high level summary information by fund which includes FTE, allocation, encumbrance, expenditure, net revenue and free balance. Totals are shown by funding source. This information is updated depending upon whether it is revenue and expenditures. Update information is shown on the Information tab.

b. **Filters**
   1) Fiscal Year – this field is the same as the filter for the Account tab.
   2) UB Entity Name – this field is the same as the filter for the Account tab.
   3) UB Entity Number – this field is the same as the filter for the Account tab.

c. **Report Contents**
   1) **Fund** - This section is designed to provide the budgeted amounts, expenditures, encumbrances, free balance, cash balances and FTE for a department by funding source.

3. **Line tab**

   a. **Purpose** – this report is designed to provide employee line information by account number for the user’s entire area or filtered by entity, name or line number.

   b. **Filters**
      1) Fiscal Year - this field is the same as the filter for the Account tab.
      2) UB Entity Name - this field is the same as the filter for the Account tab.
      3) UB Entity Number - this field is the same as the filter for the Account tab.
      4) Line Number – this field is for state employees only; a unique number used to identify a particular position assigned to this campus.
      5) Last Name begins with - the user can enter a partial last name of an employee that would appear at the beginning of this field.

   c. **Report Contents**
      1) **Line**
         a) Purpose – this report shows the annual payroll amount by employee for a selected department. It is sorted by Line number and has capabilities to drill into the account number which is in blue.

         b) **Navigation**
            - **Account Summary**
              - Summary - this field is the same as the navigation for the State Accounts tab.
              - Personal Service Regular - this field is the same as the navigation for the State Accounts tab.
              - Temporary Service - this field is the same as the navigation for the State Accounts tab.
              - OTPS - this field is the same as the navigation for the State Accounts tab.
              - Staff Benefits - this field is the same as the navigation for the State Accounts tab.
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- Temporary Service
  - Line Summary - this field is the same as the navigation for the State Accounts tab.
  - Transaction Summary - this field is the same as the navigation for the State Accounts tab.
  - Transaction Detail - this field is the same as the navigation for the State Accounts tab.
  - OEC Totals - this field is the same as the navigation for the State Accounts tab.

- Personal Service Regular
  - PSR Summary - this field is the same as the navigation for the State Accounts tab.
  - PSR Transactions - this field is the same as the navigation for the State Accounts tab.
  - PSR Transactions – Detail - this field is the same as the navigation for the State Accounts tab.
  - OEC Totals - this field is the same as the navigation for the State Accounts tab.

- OTPS
  - Transactions - this field is the same as the navigation for the State Accounts tab.

- Budget Revisions
  - Applied Budget Revisions - this field is the same as the navigation for the State Accounts tab.
  - Unapplied Budget Revisions - this field is the same as the navigation for the State Accounts tab.

- IFR Account
  - IFR Sources and Uses - this field is the same as the navigation for the State Accounts tab.
  - IFR Fees - this field is the same as the navigation for the State Accounts tab.
  - Revenue Transactions - this field is the same as the navigation for the State Accounts tab.
  - IFR Salary Recovery - this field is the same as the navigation for the State Accounts tab.

- Endowment Account
  - Unallocated Balance - this field is the same as the navigation for the State Accounts tab.
  - Endowment Principal - this field is the same as the navigation for the State Accounts tab.
  - Transactions - this field is the same as the navigation for the State Accounts tab.
  - Summary Activity – Transactions - this field is the same as the navigation for the State Accounts tab.

- Procurement Card
  - Transactions - this field is the same as the navigation for the State Accounts tab.

- eReq
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- eReq Transactions - this field is the same as the navigation for the State Accounts tab.

- ePTF
  - ePTF transactions - this field is the same as the navigation for the State Accounts tab.

2) Line Detail
   
   a) Purpose – this report shows total expenditures by line number, account number and by object. It is sorted by Line number and has capabilities to drill into the account number which is in blue.

   b) Navigation
      
      - Account Summary
        - Summary - this field is the same as the navigation for the State Accounts tab.
        - Personal Service Regular - this field is the same as the navigation for the State Accounts tab.
        - Temporary Service - this field is the same as the navigation for the State Accounts tab.
        - OTPS - this field is the same as the navigation for the State Accounts tab.
        - Staff Benefits - this field is the same as the navigation for the State Accounts tab.
      
      - Temporary Service
        - Line Summary - this field is the same as the navigation for the State Accounts tab.
        - Transaction Summary - this field is the same as the navigation for the State Accounts tab.
        - Transaction Detail - this field is the same as the navigation for the State Accounts tab.
        - OEC Totals - this field is the same as the navigation for the State Accounts tab.
      
      - Personal Service Regular
        - PSR Summary - this field is the same as the navigation for the State Accounts tab.
        - PSR Transactions - this field is the same as the navigation for the State Accounts tab.
        - PSR Transactions – Detail - this field is the same as the navigation for the State Accounts tab.
        - OEC Totals - this field is the same as the navigation for the State Accounts tab.
      
      - OTPS
        - Transactions - this field is the same as the navigation for the State Accounts tab.
      
      - Budget Revisions
        - Applied Budget Revisions - this field is the same as the navigation for the State Accounts tab.
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- Unapplied Budget Revisions - this field is the same as the navigation for the State Accounts tab.
- IFR Account
  - IFR Sources and Uses - this field is the same as the navigation for the State Accounts tab.
  - IFR Fees - this field is the same as the navigation for the State Accounts tab.
  - Revenue Transactions - this field is the same as the navigation for the State Accounts tab.
  - IFR Salary Recovery - this field is the same as the navigation for the State Accounts tab.
- Endowment Account
  - Unallocated Balance - this field is the same as the navigation for the State Accounts tab.
  - Endowment Principal - this field is the same as the navigation for the State Accounts tab.
  - Transactions - this field is the same as the navigation for the State Accounts tab.
  - Summary Activity – Transactions - this field is the same as the navigation for the State Accounts tab.
- Procurement Card
  - Transactions - this field is the same as the navigation for the State Accounts tab.
- eReq
  - eReq Transactions - this field is the same as the navigation for the State Accounts tab.
- ePTF
  - ePTF transactions - this field is the same as the navigation for the State Accounts tab.

4. Budget Revisions tab
   a. Purpose - this section provides the user with information on their budget revisions for their entire area or the specific filtered criteria that they entered.

   b. Filters
      1) Fiscal Year - this field is the same as the filter for the Account tab.
      2) UB Entity Name - this field is the same as the filter for the Account tab.
      3) UB Entity Number - this field is the same as the filter for the Account tab.
      4) Account Number - this field is the same as the filter for the Account tab.
      5) Revision Number – this is a six digit number that has been assigned to the revision from the Financial Services office. Leading zeros must be keyed in order to obtain results.
      6) Department Audit Number – this is a field that can hold five characters. The departmental user designates this field when filling out a budget revision.
      7) Line Number - this field is the same as the filter for the Line tab.

   c. Report Contents
      1) Applied Budget Revisions
Strategic Information Reporting Initiative (SIRI)

a) Purpose - This section provides the user with information on their budget revisions that have been applied to their accounts for their entire area or for the specific criteria that they have entered.

b) Navigation

- Account Summary
  - Summary - this field is the same as the navigation for the State Accounts tab.
  - Personal Service Regular - this field is the same as the navigation for the State Accounts tab.
  - Temporary Service - this field is the same as the navigation for the State Accounts tab.
  - OTPS - this field is the same as the navigation for the State Accounts tab.
  - Staff Benefits - this field is the same as the navigation for the State Accounts tab.

- Temporary Service
  - Line Summary - this field is the same as the navigation for the State Accounts tab.
  - Transaction Summary - this field is the same as the navigation for the State Accounts tab.
  - Transaction Detail - this field is the same as the navigation for the State Accounts tab.
  - OEC Totals - this field is the same as the navigation for the State Accounts tab.

- Personal Service Regular
  - PSR Summary - this field is the same as the navigation for the State Accounts tab.
  - PSR Transactions - this field is the same as the navigation for the State Accounts tab.
  - PSR Transactions – Detail - this field is the same as the navigation for the State Accounts tab.
  - OEC Totals - this field is the same as the navigation for the State Accounts tab.

- OTPS
  - Transactions - this field is the same as the navigation for the State Accounts tab.

- Budget Revisions
  - Applied Budget Revisions - this field is the same as the navigation for the State Accounts tab.
  - Unapplied Budget Revisions - this field is the same as the navigation for the State Accounts tab.

- IFR Account
  - IFR Sources and Uses - this field is the same as the navigation for the State Accounts tab.
  - IFR Fees - this field is the same as the navigation for the State Accounts tab.
Strategic Information Reporting Initiative (SIRI)

- Revenue Transactions - this field is the same as the navigation for the State Accounts tab.
- IFR Salary Recovery - this field is the same as the navigation for the State Accounts tab.

- Endowment Account
  - Unallocated Balance - this field is the same as the navigation for the State Accounts tab.
  - Endowment Principal - this field is the same as the navigation for the State Accounts tab.
  - Transactions - this field is the same as the navigation for the State Accounts tab.
  - Summary Activity – Transactions - this field is the same as the navigation for the State Accounts tab.

- Procurement Card
  - Transactions - this field is the same as the navigation for the State Accounts tab.

- eReq
  - eReq Transactions - this field is the same as the navigation for the State Accounts tab.

- ePTF
  - ePTF transactions - this field is the same as the navigation for the State Accounts tab.

2) Unapplied Budget Revisions
   a) Purpose - This section provides the user with information on their future budget revisions that have not been applied yet to their accounts, but will be applied in the future. This covers their entire area or for the specific criteria that they have entered.

   b) Navigation
      - Account Summary
        - Summary - this field is the same as the navigation for the State Accounts tab.
        - Personal Service Regular - this field is the same as the navigation for the State Accounts tab.
        - Temporary Service - this field is the same as the navigation for the State Accounts tab.
        - OTPS - this field is the same as the navigation for the State Accounts tab.
        - Staff Benefits - this field is the same as the navigation for the State Accounts tab.
      - Temporary Service
        - Line Summary - this field is the same as the navigation for the State Accounts tab.
        - Transaction Summary - this field is the same as the navigation for the State Accounts tab.
        - Transaction Detail - this field is the same as the navigation for the State Accounts tab.
Strategic Information Reporting Initiative (SIRI)

- OEC Totals - this field is the same as the navigation for the State Accounts tab.
- Personal Service Regular
  - PSR Summary - this field is the same as the navigation for the State Accounts tab.
  - PSR Transactions - this field is the same as the navigation for the State Accounts tab.
  - PSR Transactions – Detail - this field is the same as the navigation for the State Accounts tab.
- OEC Totals - this field is the same as the navigation for the State Accounts tab.
- OTPS
  - Transactions - this field is the same as the navigation for the State Accounts tab.
- Budget Revisions
  - Applied Budget Revisions - this field is the same as the navigation for the State Accounts tab.
  - Unapplied Budget Revisions - this field is the same as the navigation for the State Accounts tab.
- IFR Account
  - IFR Sources and Uses - this field is the same as the navigation for the State Accounts tab.
  - IFR Fees - this field is the same as the navigation for the State Accounts tab.
  - Revenue Transactions - this field is the same as the navigation for the State Accounts tab.
  - IFR Salary Recovery - this field is the same as the navigation for the State Accounts tab.
- Endowment Account
  - Unallocated Balance - this field is the same as the navigation for the State Accounts tab.
  - Endowment Principal - this field is the same as the navigation for the State Accounts tab.
  - Transactions - this field is the same as the navigation for the State Accounts tab.
  - Summary Activity – Transactions - this field is the same as the navigation for the State Accounts tab.
- Procurement Card
  - Transactions - this field is the same as the navigation for the State Accounts tab.
- eReq
  - eReq Transactions - this field is the same as the navigation for the State Accounts tab.
- ePTF
  - ePTF transactions - this field is the same as the navigation for the State Accounts tab.

5. OEC and FTE tab
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a. **Purpose** – this section provides the user with information on their expenditures summarized by OEC codes and their FTE broken out by instructional and non-instructional employees. This information is for their entire area or for the specific criteria that they have entered.

b. **Filters**
   1) Fiscal Year - this field is the same as the filter for the Account tab.
   2) UB Entity Name - this field is the same as the filter for the Account tab.
   3) UB Entity Number - this field is the same as the filter for the Account tab.
   4) State Account Number - this field is the same as the filter for the Account tab.
   5) Trial Balance - this field is the same as the filter for the Account tab.
   6) RF Project - this field is the same as the filter for the Account tab.
   7) RF Task - this field is the same as the filter for the Account tab.
   8) RF Award - this field is the same as the filter for the Account tab.
   9) RF Trial Balance - this field is the same as the filter for the Account tab.
  10) UBF Account Number - this field is the same as the filter for the Account tab.

c. **Report Contents**
   1) **State OEC Summary**
      a) Purpose - this section provides the user with information on their expenditures summarized by State OEC codes. This information is for their entire area or for the specific criteria that they have entered.

   2) **Research Foundation Summary**
      a) Purpose - this section provides the user with information on their expenditures summarized by RF expenditure category. This information is for their entire area or for the specific criteria that they have entered.

   3) **FTE Summary**
      a) Purpose - this section provides the user with information on their FTE broken out by instructional and non-instructional employees. This information is for their entire area or for the specific criteria that they have entered.

6. **IFR Fees tab**
   a. **Purpose** - this section provides the user with information on the IFR fees that are being charged on campus.

   b. **Filters**
      1) Fiscal Year - this field is the same as the filter for the Account tab.
      2) UB Entity Name - this field is the same as the filter for the Account tab.
      3) UB Entity Number - this field is the same as the filter for the Account tab.

c. **Report Contents**
   1) **IFR Fees**
      a) Purpose - this section provides the user with information on the IFR fees that are being charged on campus. The accounts are able to be drilled into for further information (if the user has access to that account).
b) Navigation

- **Account Summary**
  - Summary - this field is the same as the navigation for the State Accounts tab.
  - Personal Service Regular - this field is the same as the navigation for the State Accounts tab.
  - Temporary Service - this field is the same as the navigation for the State Accounts tab.
  - OTPS - this field is the same as the navigation for the State Accounts tab.
  - Staff Benefits - this field is the same as the navigation for the State Accounts tab.

- **Temporary Service**
  - Line Summary - this field is the same as the navigation for the State Accounts tab.
  - Transaction Summary - this field is the same as the navigation for the State Accounts tab.
  - Transaction Detail - this field is the same as the navigation for the State Accounts tab.
  - OEC Totals - this field is the same as the navigation for the State Accounts tab.

- **Personal Service Regular**
  - PSR Summary - this field is the same as the navigation for the State Accounts tab.
  - PSR Transactions - this field is the same as the navigation for the State Accounts tab.
  - Transaction Detail - this field is the same as the navigation for the State Accounts tab.
  - OEC Totals - this field is the same as the navigation for the State Accounts tab.

- **OTPS**
  - Transactions - this field is the same as the navigation for the State Accounts tab.

- **Budget Revisions**
  - Applied Budget Revisions - this field is the same as the navigation for the State Accounts tab.
  - Unapplied Budget Revisions - this field is the same as the navigation for the State Accounts tab.

- **IFR Account**
  - Sources and Uses - this field is the same as the navigation for the State Accounts tab.
  - Fees - this field is the same as the navigation for the State Accounts tab.
  - Revenue Transactions - this field is the same as the navigation for the State Accounts tab.
  - Salary Recovery - this field is the same as the navigation for the State Accounts tab.
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- Endowment Account
  - Unallocated Balance - this field is the same as the navigation for the State Accounts tab.
  - Endowment Principal - this field is the same as the navigation for the State Accounts tab.
  - Transactions - this field is the same as the navigation for the State Accounts tab.
  - Summary Activity Transactions - this field is the same as the navigation for the State Accounts tab.

- Procurement Card
  - Transactions - this field is the same as the navigation for the State Accounts tab.

- eReq
  - eReq Transactions - this field is the same as the navigation for the State Accounts tab.

- ePTF
  - ePTF Transactions - this field is the same as the navigation for the State Accounts tab.

7. IFR Salary Recovery tab
   a. Purpose – this section summarizes the IFR salary recovery for the user’s entire area or for the specific criteria that they have entered.

   b. Filters
      1) Fiscal Year - this field is the same as the filter for the Account tab.
      2) UB Entity Name - this field is the same as the filter for the Account tab.
      3) UB Entity Number - this field is the same as the filter for the Account tab.
      4) Account Number - this field is the same as the filter for the Account tab.
      5) Posted Date (between).

   c. Report Contents
      1) Account Summary
         a) Purpose – this section summarizes the salary and fringes by the IFR account(s) that are collecting salary recovery dollars from grants.

         b) Navigation
            - Account Summary
              - Summary - this field is the same as the navigation for the State Accounts tab.
              - Personal Service Regular - this field is the same as the navigation for the State Accounts tab.
              - Temporary Service - this field is the same as the navigation for the State Accounts tab.
              - OTPS - this field is the same as the navigation for the State Accounts tab.
              - Staff Benefits - this field is the same as the navigation for the State Accounts tab.

              - Temporary Service
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- Line Summary - this field is the same as the navigation for the State Accounts tab.
- Transaction Summary - this field is the same as the navigation for the State Accounts tab.
- Transaction Detail - this field is the same as the navigation for the State Accounts tab.
- OEC Totals- this field is the same as the navigation for the State Accounts tab.

- Personal Service Regular
  - PSR Summary - this field is the same as the navigation for the State Accounts tab.
  - PSR Transactions - this field is the same as the navigation for the State Accounts tab.
  - Transaction Detail - this field is the same as the navigation for the State Accounts tab.
  - OEC Totals - this field is the same as the navigation for the State Accounts tab.

- OTPS
  - Transactions - this field is the same as the navigation for the State Accounts tab.

- Budget Revisions
  - Applied Budget Revisions - this field is the same as the navigation for the State Accounts tab.
  - Unapplied Budget Revisions - this field is the same as the navigation for the State Accounts tab.

- IFR Account
  - Sources and Uses - this field is the same as the navigation for the State Accounts tab.
  - Fees - this field is the same as the navigation for the State Accounts tab.
  - Revenue Transactions - this field is the same as the navigation for the State Accounts tab.
  - Salary Recovery - this field is the same as the navigation for the State Accounts tab.

- Procurement Card
  - Transactions - this field is the same as the navigation for the State Accounts tab.

- eReq
  - eReq Transactions - this field is the same as the navigation for the State Accounts tab.

- ePTF
  - ePTF Transactions - this field is the same as the navigation for the State Accounts tab.

2) Person Summary

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a) Purpose - this section summarizes the salary and fringes by person by the IFR account(s) that are collecting salary recovery dollars from grants.

b) Navigation

- **Account Summary**
  - Summary - this field is the same as the navigation for the State Accounts tab.
  - Personal Service Regular - this field is the same as the navigation for the State Accounts tab.
  - Temporary Service - this field is the same as the navigation for the State Accounts tab.
  - OTPS - this field is the same as the navigation for the State Accounts tab.
  - Staff Benefits - this field is the same as the navigation for the State Accounts tab.

- **Temporary Service**
  - Line Summary - this field is the same as the navigation for the State Accounts tab.
  - Transaction Summary - this field is the same as the navigation for the State Accounts tab.
  - Transaction Detail - this field is the same as the navigation for the State Accounts tab.
  - OEC Totals - this field is the same as the navigation for the State Accounts tab.

- **Personal Service Regular**
  - PSR Summary - this field is the same as the navigation for the State Accounts tab.
  - PSR Transactions - this field is the same as the navigation for the State Accounts tab.
  - Transaction Detail - this field is the same as the navigation for the State Accounts tab.
  - OEC Totals - this field is the same as the navigation for the State Accounts tab.

- **OTPS**
  - Transactions - this field is the same as the navigation for the State Accounts tab.

- **Budget Revisions**
  - Applied Budget Revisions - this field is the same as the navigation for the State Accounts tab.
  - Unapplied Budget Revisions - this field is the same as the navigation for the State Accounts tab.

- **IFR Account**
  - Sources and Uses - this field is the same as the navigation for the State Accounts tab.
  - Fees - this field is the same as the navigation for the State Accounts tab.
  - Revenue Transactions - this field is the same as the navigation for the State Accounts tab.
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- Salary Recovery - this field is the same as the navigation for the State Accounts tab.

- Procurement Card
  - Transactions - this field is the same as the navigation for the State Accounts tab.

- eReq
  - eReq Transactions - this field is the same as the navigation for the State Accounts tab.

- ePTF
  - ePTF Transactions - this field is the same as the navigation for the State Accounts tab.

3) Transaction Detail
   a) Purpose - this section summarizes the salary and fringes by grant award number by the IFR account(s) that are collecting salary recovery dollars from grants.

   b) Navigation
      - Account Summary
        - Summary - this field is the same as the navigation for the State Accounts tab.
        - Personal Service Regular - this field is the same as the navigation for the State Accounts tab.
        - Temporary Service - this field is the same as the navigation for the State Accounts tab.
        - OTPS - this field is the same as the navigation for the State Accounts tab.
        - Staff Benefits - this field is the same as the navigation for the State Accounts tab.
      - Temporary Service
        - Line Summary - this field is the same as the navigation for the State Accounts tab.
        - Transaction Summary - this field is the same as the navigation for the State Accounts tab.
        - Transaction Detail - this field is the same as the navigation for the State Accounts tab.
        - OEC Totals - this field is the same as the navigation for the State Accounts tab.
      - Personal Service Regular
        - PSR Summary - this field is the same as the navigation for the State Accounts tab.
        - PSR Transactions - this field is the same as the navigation for the State Accounts tab.
        - Transaction Detail - this field is the same as the navigation for the State Accounts tab.
        - OEC Totals - this field is the same as the navigation for the State Accounts tab.
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- OTPS
  - Transactions - this field is the same as the navigation for the State Accounts tab.

- Budget Revisions
  - Applied Budget Revisions - this field is the same as the navigation for the State Accounts tab.
  - Unapplied Budget Revisions - this field is the same as the navigation for the State Accounts tab.

- IFR Account
  - Sources and Uses - this field is the same as the navigation for the State Accounts tab.
  - Fees - this field is the same as the navigation for the State Accounts tab.
  - Revenue Transactions - this field is the same as the navigation for the State Accounts tab.
  - Salary Recovery - this field is the same as the navigation for the State Accounts tab.

- Procurement Card
  - Transactions - this field is the same as the navigation for the State Accounts tab.

- eReq
  - eReq Transactions - this field is the same as the navigation for the State Accounts tab.

- ePTF
  - ePTF Transactions - this field is the same as the navigation for the State Accounts tab.

8. Reports tab
   a. Purpose – this section has a listing of reports that can be run after selecting certain criteria. Once a report has been chosen, the user is then given various filters to go through in order to narrow down the information that will be reported. Some filters can be skipped.
MONEY FAQ’s

Q. Why does only a portion of my information show up when I print?
A. Please refer to section III B in the User Guide. If you use the print icon at the bottom of the page and have not “opened” up all of your results to show more than the 25 records that automatically display, you will only see those 25 records. Think of this icon as a print screen.

Q. What do all of the acronyms mean on each of the pages?
A. Please refer to the Accounting Terminology document. http://ubbusiness.buffalo.edu/ubb/cfm/glossary/

Q. Why do some accounts have a green section in Money for State accounts and others have nothing in this section?
A. This green section is for accounts that have a cash balance. State Operating accounts have allocation, not cash. IFR and SUTRA accounts have cash, so you should see balances in this section for those types of accounts.

Q. Why do “no results” show at times when I use multiple filters?
A. If your filters conflict then “no results” will show. Please make sure if you put in an account number you do not use a conflicting entity or trial balance.

Q. Why can’t I clear out my filters at times?
A. Sometimes the filters may become stuck and reappear after you have deleted them. To clear these out you should click on Page Options and click on Clear My Selections. Your filters will then go away.

Q. Why don’t my budget revisions show up when I key in a budget revision number?
A. Budget revision numbers are transferred to SIRI as text. You, therefore, have to put in the leading zeros that the budget revision number has or you will have no results returned. The budget revision number is a 6 digit number.

Q. Why can I see data in external systems such as UBFirst but I cannot see this in SIRI?
A. Although you may obtain access to systems such as UBFirst, PIAI and Infosource you must make sure that when you request this access you tell the data custodian that you want access to SIRI. There are additional levels of security access that must be granted in order for you to see this data in SIRI.

Q. What is the difference between Expected PSR Free Balance in the PSR tab and Free Balance in the Account Summary tab?
A. Expected Free balance in the PSR tab is the free balance of each employee’s line when it is assumed that the employee will be reappointed so their payroll will be encumbered for the balance of the year. Free Balance is the budget left for the entire account not including the estimate of payroll encumbrance should you reappoint your employee for the balance of the year.

Q. Is SIRI on a lag for the data that is fed into the system?
A. Please refer to the Data Update Frequency section that is in the Information tab.
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Q. I can’t view my account(s), what do I do?
A. Check with the data trustees for the funding source that you are trying to access to see
   if you have approval to view these accounts -- STATE form   RF form

Q. Where do I look to find my IFR cash balance?
A. For basic balance inquiry you can go to the Account tab in Money and look at the
   green section. This balance will not have your encumbrances subtracted out. For a true
   viewing of your balance with encumbrances subtracted you should look at the IFR
   account tab after clicking on your IFR account and drilling into that tab.

Q. Where do I look to see Salary Recovery deposits/detail?
A. Your salary recovery deposits and detail can be viewed on the IFR Salary Recovery
   tab in Money. There are 3 sections, Account summary which summarizes your deposits
   by account, person summary which summarizes your deposits by person, transaction
   detail which summarizes your deposits by grant number.

Q. Where do my IFR fringe costs post?
A. Fringe costs for IFR accounts show in the IFR account tab, you can get to this tab by
   drilling into your IFR account in the Money account tab.

Q. How long does it take for revenue to post?
A. Revenue for IFR accounts post every 15 days. To see the last revenue posting date,
   please refer to the Data Update Frequency section in the Information tab.

Q. How accurate is RF data in SIRI?
A. RF data is not entirely complete. Certain data is missing such as cash receipts and
   payroll by employee. The SIRI team is working with RF central in order to obtain more
   RF information .