

Finding Research Foundation Cost Approvers or Accounting Codes

Follow these troubleshooting steps if you cannot find a Research Foundation (RF) account cost approver or accounting code when using UB business applications such as eReq, ShopBlue, or the travel and expense system (Concur).

1. Confirm the Account is Active

Check in SIRI to confirm that the RF account is active:

- Log into SIRI.
- At the top, click *Dashboards*, then click on the *Support Tables* dashboard (Figure 1).

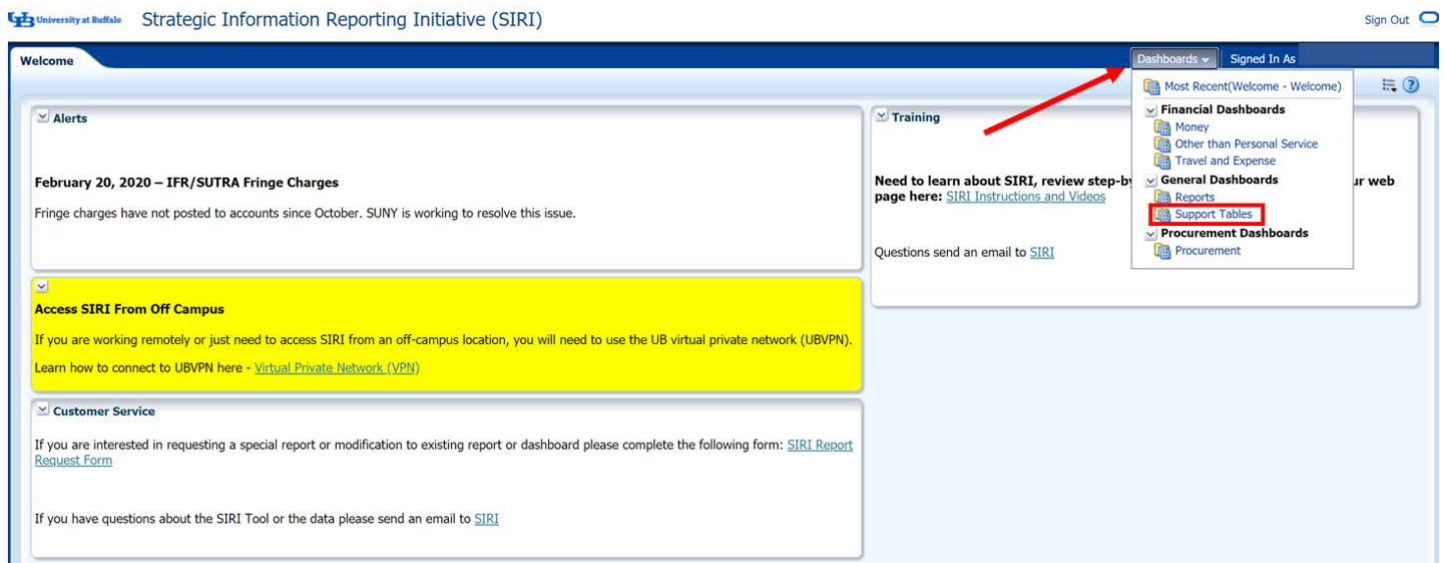


Figure 1

- At the top of the *Support Tables* dashboard, click on the *Chart of Accounts* tab (Figure 2).

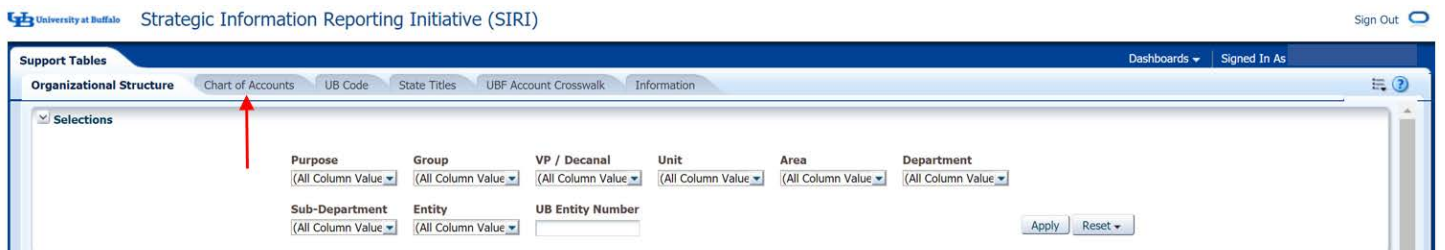


Figure 2

- On the *Chart of Accounts* tab in the *Selections* area, enter the RF account number (also called the Project-Task-Award or PTA number) in the *Account Number* field and click *Apply* (Figure 3).

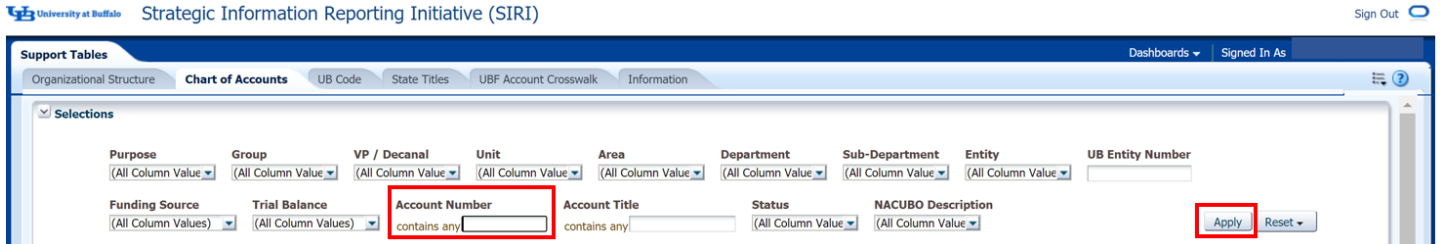


Figure 3

- In most instances, it is sufficient to only enter the project number in the *Account Number* field. However, if you choose to enter the full account number, be sure to enter it in award number, project number, and task number order without any dashes or spaces.
- When the results appear, view the *Status* column to determine whether the account is *Active*, *Closed*, or *Pending Closed* (Figure 4). If the status is *Closed* or *Pending Closed*, the RF account cannot be approved.

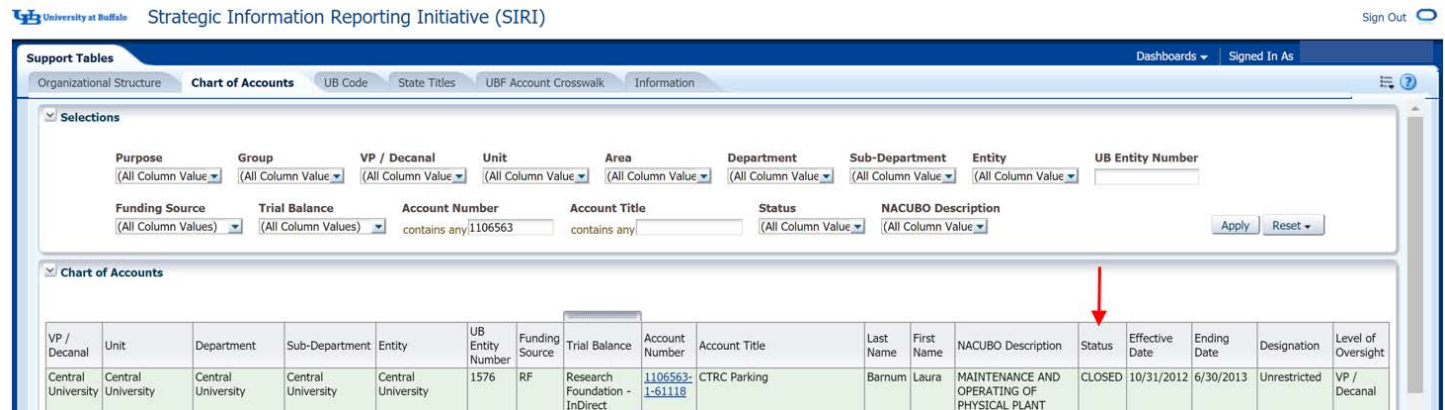


Figure 4

- For assistance with account status issues:
 - For sponsored RF accounts, contact Sponsored Projects Services (SPS) using the [SPS grant expert staff directory](#) depending on what department the account is assigned to.
 - For internal (non-sponsored) RF accounts, contact the Non-Sponsored Group at ubsd.nsgroup@business.buffalo.edu.

2. Verify the Current Account Cost Approvers

Check in SIRI to find a list of the current cost approvers on the account. You can find this information on the *Cost Approval* tab on the Procurement, Travel and Expense, and Security dashboards in SIRI.

- Log into SIRI.
- At the top, click *Dashboards*.
- Depending on which dashboard you have access to, click on the *Procurement, Travel and Expense, or Security* dashboard (Figure 5).

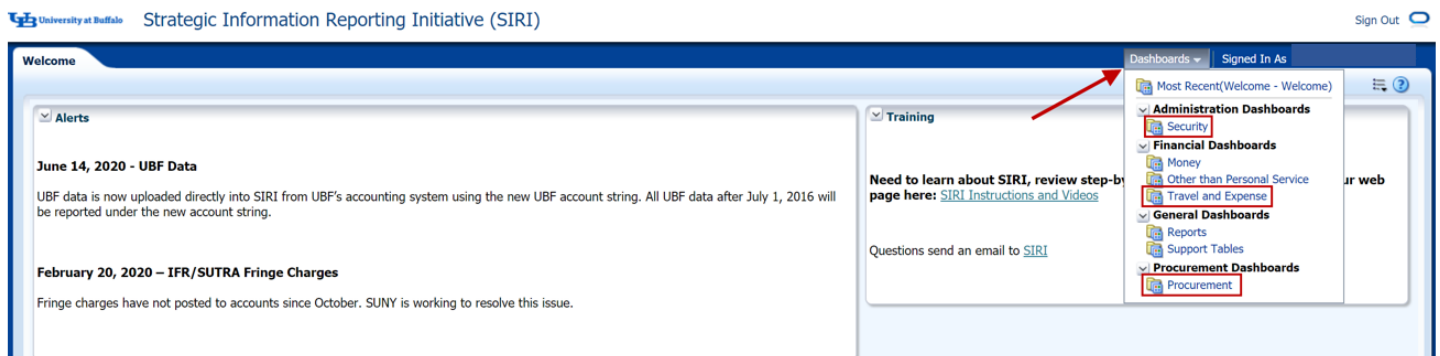


Figure 5

- On the dashboard you selected, click on the *Cost Approval* tab at the top:
 - On the Procurement dashboard, click the *Cost Approval* tab at the top (Figure 6).

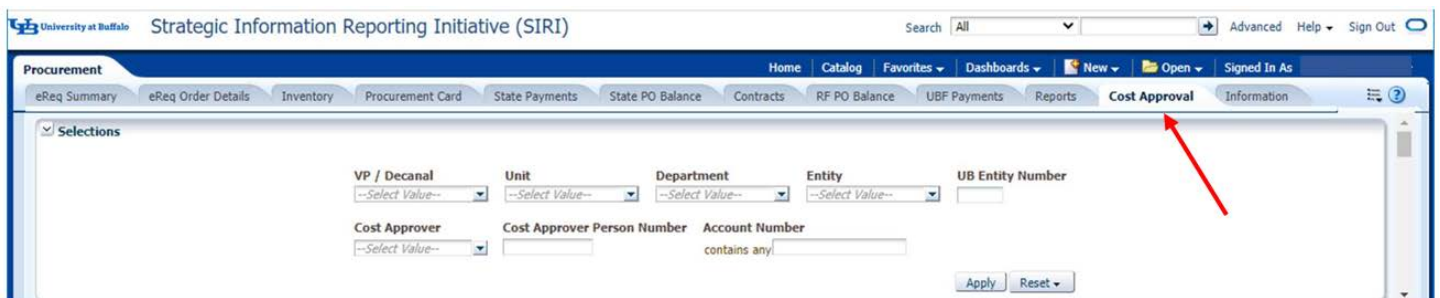


Figure 6

- On the Travel and Expense dashboard, click the *Cost Approval* tab at the top (Figure 7).

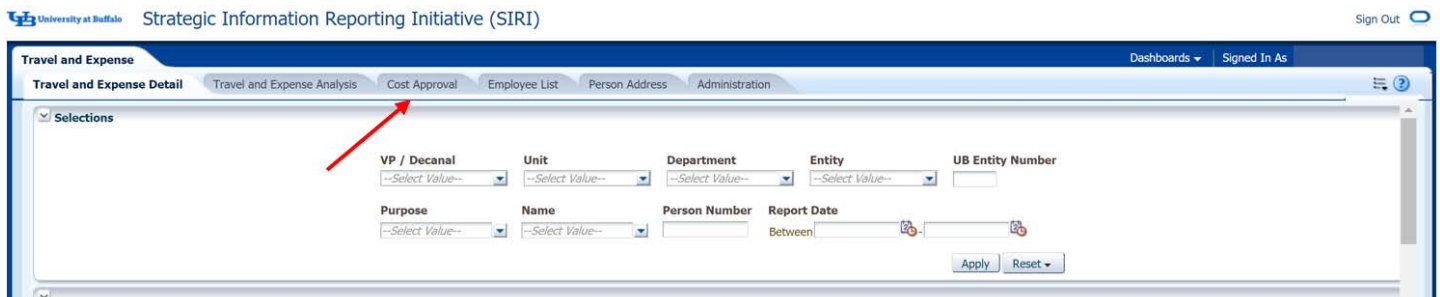


Figure 7

- On the Security dashboard, click the *Cost Approval* tab at the top (Figure 8).

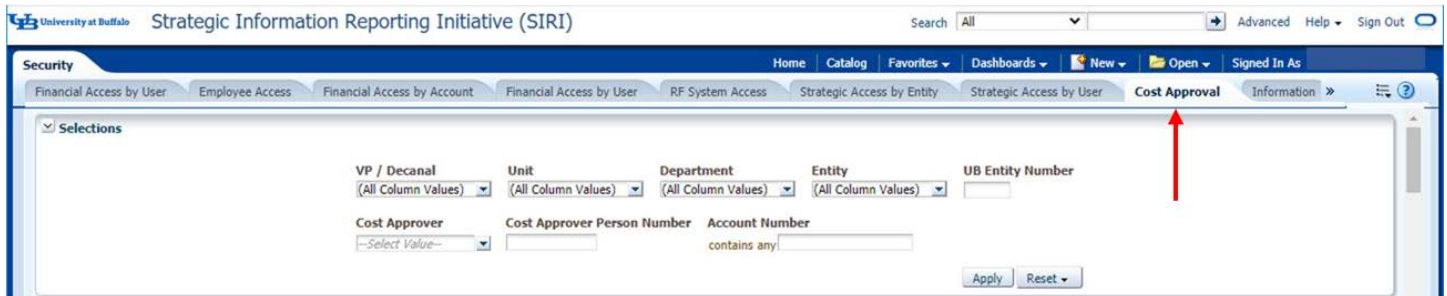


Figure 8

- On the *Cost Approval* tab on any of the dashboards, enter the full account number, or just the project number, in the *Account Number* field and click *Apply*.
- The results will show the list of cost approvers on the account you entered (Figure 9).

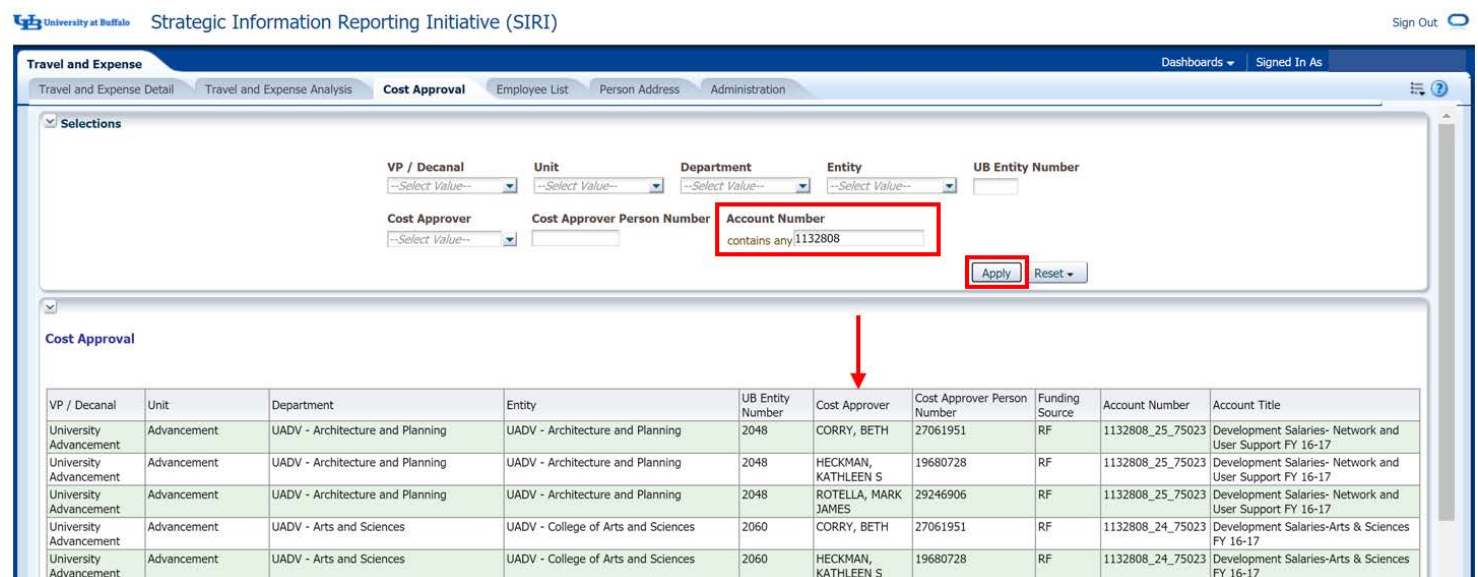


Figure 9

- Note that the Principal Investigator (PI) is automatically a cost approver on the account.
- If the PI is not listed on the account and the account is active, it most likely means there is an issue with the account or with the PI's RF Human Resources record.
 - For sponsored RF accounts, contact Sponsored Projects Services (SPS) using the [SPS grant expert staff directory](#) depending on what department the account is assigned to.
 - For internal (non-sponsored) RF accounts, contact the Non-Sponsored Group at ubsd.nsgroup@business.buffalo.edu.

3. Confirm the Principal Investigator on the Account is a Current Employee

- Verify that the Principal Investigator on the account is a current employee.
- To confirm the PI's employee status, contact the department Human Resources office.

4. Allow 4 Days for RF Account Updates to Process

- RF account updates made in the RF Oracle Business System will take 4 days to process.
- If the RF account was recently entered or updated in the RF system, it will take 4 days for the change to process and appear in eReq, ShopBlue, or the travel and expense system (Concur).

5. Submit a New RF Account Cost Approver Request

- Note that the Principal Investigator (PI) is automatically a cost approver on the account. Submit a new request when additional cost approvers need to be added to the account.
- To add a cost approver to an RF account, complete and submit the RF Cost Approver Access Request form at the following link:

<http://www.buffalo.edu/administrative-services/forms-catalog/procurement/approver-auth-for-research-foundation.html>