

PRISM User Access Form Instructions

The University of Pittsburgh's PRISM (Pitt's Real-time Integrated Solution for Management) system was implemented on July 1, 1997. PRISM modules include Accounts Payable, General Ledger, Purchasing, Purchasing Card (PCard), Research Proposal and Accounting (RPA), Human Resources, Payroll and Labor Distribution.

PRISM access requires the completion of the **PRISM Access Information** and may require completion of the **Departmental Security Rule Information** if this is a new department for access.

The PRISM Access Information form defines the profile for an individual's access within a PRISM department/division. This form is completed when a department or division is requesting access for an individual to a specific PRISM department/division or requesting a change to an individual's existing access.

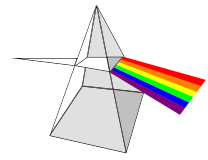
The Departmental Security Rule Information form declares all University department numbers associated within a PRISM department/division name, regardless of entity or application module. This form is only necessary for new departments or changes to existing departments. All completed and signed forms are to be sent to **Pitt IT Business Solutions Customer Assessment**, 1917 Cathedral of Learning, for processing or email/fax to fisbfax@cfo.pitt.edu / 412-688-6064.

To schedule training, view on-line demos or if you have any questions, please refer to our website at <http://prism.pitt.edu/>.

PRISM Access Information Form

Page 1 – Required for all requests

1. Select the type of access request (New User, Existing User, Access Termination). Access Termination will only terminate application access to PRISM.
2. Enter an effective date in mm/dd/yy format. This is the date the new, modified or terminated access should begin.
3. Enter the requester's name and the last four digits of their social security number. The requester is the person who requires PRISM access.
4. Print the full legal name of the requester as recorded on the Employee Record. For example, Patti Smith's legal name could be Patricia Ann Smith.
5. Enter the department or division name and Responsibility Center (RC) number.
6. Enter the preferred email address of the person needing access.
7. Enter the requestor's current University Computer Account. The requester's Responsibility Center Account Administrator is responsible for creating a University Computer Account if the requester does not already have one. As of August 28, 2000, all new University employees will automatically receive an account. A listing of RC Administrators can be found at (bottom of page) <https://www.technology.pitt.edu/help-desk/how-to-documents/directory-services-what-responsibility-center-account-administrator>. If the requester has an active PRISM account, only the current PRISM user ID field is required.
8. For Non Pitt employees only, complete the designated box with the appropriate sex, birth date (mm/dd/yy) and social security number.
9. If necessary, add any additional comments or explanations.
10. Please have the person requesting access, their supervisor and authorized RC designate sign the form in the appropriate fields. If you do not know the name of this individual, a list is posted on our website under <http://prism.pitt.edu/access/>). Access will not be granted until all of these signatures are present.



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1

Please choose one:

New User

Existing User

Access Termination

2

3

Effective Date: _____ Last 4 of Social Security Number: xxx - xx - _____

3

Requester: _____

4

Print full "Legal" Name: _____

5

Department or Division Name: _____ Responsibility Center #: _____

6

Preferred Email Address: _____

7

My Current Network Authorization Account is : _____

Or My Current PRISM Account User ID is : _____

* To get your printer setup for PRISM, please submit a help ticket at <https://www.technology.pitt.edu/247-it-help-desk> or call 412-624-4357.

8

NON Pitt Employees Only: Female Male

Birth Date: _____

SSN: _____

Business Solutions USE ONLY:

9

Additional Comments: _____

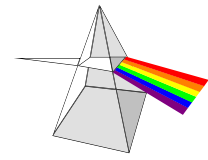
10

Requester Signature: _____ Date: _____ Phone: _____

Supervisor Printed Name: _____

Supervisor Signature: _____ Date: _____ Phone: _____

Authorized RC Signature: _____ Date: _____ Phone: _____



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Page 2 – General Ledger Responsibility Request:

1. Select the appropriate responsibilities and one action (Add or Delete) for each responsibility selected. Each responsibility is associated with one or more specific entities.

For example, if you choose Operating/Grants Inquiry and requested Chemistry as the department, you will only be able to view transactions within accounts beginning with entities 02 or 05 and department numbers defined for Chemistry. Any valid subcode (including payroll), project or purpose within those account constraints can be viewed with this particular responsibility. Below is a brief description of each responsibility:

GL Business Administrator Inquiry – allows a user to view GL transactions in all subcodes, including payroll, and to submit and view GL reports for all departmental accounts within entities 02, 03, 04, 05, 06, 07, 08, 09, 47, and 48.

GL Business Administrator Entry – allows a user to perform GL inquiries and data entry in non-payroll subcodes within departmental accounts in entities 02, 03, 04, 05, and 09. The user may also submit and view GL reports.

GL Business Administrator Transfers – allows a user to perform GL inquiries and transfer entries on 826x subcodes within departmental accounts in entities 02, 03, and 04. The user may also submit and view GL reports.

GL Operating Inquiry – allows a user to view GL transactions in all subcodes, including payroll, and to submit and view GL reports for all departmental accounts within entities 02 and 03.

GL Operating Entry – allows a user to perform GL inquiries and data entry in non-payroll subcodes within departmental accounts in entities 02 and 03. The user may also submit and view GL reports.

GL Operating Transfers – allows a user to perform GL inquiries and transfer entries on 826x subcodes within departmental accounts in entities 02 and 03. The user may also submit and view GL reports.

GL Operating/Grants Inquiry – allows a user to view GL transactions in all subcodes, including payroll, and to submit and view GL reports for all departmental accounts within entities 02 and 05. For inclusion of RDF accounts (04, 3xxxx) please check the associated box.

GL Operating/Grants Entry – allows a user to perform GL inquiries and data entry in non-payroll subcodes within departmental accounts in entities 02 and 05. For inclusion of RDF accounts (04, 3xxxx) please check the associated box. The user may also submit and view GL reports.

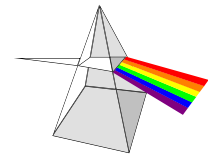
GL Grants Inquiry – allows a user to view GL transactions in all subcodes, including payroll, and to submit and view GL reports for all departmental accounts within entity 05. For inclusion of RDF accounts (04, 3xxxx) please check the associated box.

GL Grants Entry – allows a user to perform GL inquiries and data entry in non-payroll subcodes within departmental accounts in entity 05. For inclusion of RDF accounts (04, 3xxxx) please check the associated box. The user may also submit and view GL reports.

GL Restricted Inquiry – allows a user to view GL transactions in all subcodes, including payroll, and to submit and view GL reports for all departmental accounts within entities 04 and 09.

GL Restricted Entry – allows a user to perform GL inquiries and data entry in non-payroll subcodes within departmental accounts in entities 04 and 09. The user may also submit and view GL reports.

GL Restricted Transfers – allows a user to perform GL inquiries and transfer entries on 826x subcodes within departmental accounts in entity 04 only. The user may also submit and view GL reports.



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GL Department Entry – allows a user to perform only GL data entry in non-payroll subcodes within departmental accounts in entities 02, 03, 04, 05, and 09. The user may also submit and view limited GL reports.

GL Department Transfers – allows a user to perform only GL transfer entries on 826x subcodes within departmental accounts in entities 02, 03, and 04. The user may also submit and view limited GL reports.

GL IDC Entry – allows a user to enter interdepartmental charges for authorized subcodes. This responsibility should only be chosen if the IDC authorization code already exists. Please enter that 2-digit number in the designated area. If the access does not currently exist, please complete page 3 of the form.

GL Cash Report Entry – For authorized direct depositors and payment card merchants only, allows a user to enter on-line Cash Reports. The department must be classified as a direct depositor by Office of Finance.

Page 3 – Purchasing Responsibility Request:

**The University's primary Purchasing application is PantherExpress. PRISM Purchasing is only used for viewing historical purchase orders and opening new account combinations for use in PantherExpress. Please visit the PantherExpress website for additional details <http://www.cfo.pitt.edu/pexpress/index.php>.

1. Select the appropriate responsibilities and one action (Add or Delete) for each responsibility selected. Each responsibility is associated with one or more specific entities as designated below each responsibility name. For example, if you choose Restricted Purchaser and requested Biological Sciences as the department, the purchaser will be able to create purchases orders and requisitions against accounts beginning only with entities 04 and 09 for the specific department numbers defined in Biological Sciences' department security rule. Any valid subcode, project or purpose within those account constraints can be utilized.
2. All Approver responsibilities can create purchase orders and requisitions as well as approve them. Therefore it is not necessary to choose both purchaser and approver responsibilities. An approver can perform the same tasks as a purchaser but with some added functionality, such as Forward Documents and submit additional detail reports. Below is a brief description of each responsibility:

PO Business Administrative Purchaser/Approver – allows user to submit and approve PO's and requisitions against their designated department accounts within the 02, 03, 04, 05 and 09 entities only. They can enter receipts and submit reports.

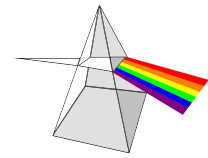
PO Operating Purchaser/Approver - allows user to submit and approve PO's and requisitions against their designated department accounts within the 02 and 03 entities only. They can enter receipts and submit reports.

PO Operating/Grants Purchaser/Approver - allows user to submit and approve PO's and requisitions against their designated department accounts within entities 02 and 05. For inclusion of RDF accounts (04, 3xxxx) please check the associated box. They can enter receipts and submit reports.

PO Grants Purchaser/Approver - allows user to submit and approve PO's and requisitions against their designated department accounts within the entity 05. For inclusion of RDF accounts (04, 3xxxx) please check the associated box. They can enter receipts and submit reports.

PO Restricted Purchaser/Approver - allows user to submit and approve PO's and requisitions against their designated department accounts within the 04 and 09 entities only. They can enter receipts and submit reports.

3. At this time, all PRISM access for Purchasing is grant the Level 0 limit as the primary Purchasing application is PantherExpress as noted above.



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Page 4 – Purchasing Card Responsibility Request:

1. Select the appropriate responsibilities and one action (Add or Delete) for each responsibility selected. Each responsibility is associated with one or more specific entities as designated below each responsibility name. For example, if you choose Restricted Entry and requested Biological Sciences as the department, the user will be able to redistribute PCard charges against accounts beginning only with entities 04 and 09 for the specific department numbers defined in Biological Sciences' department security rule. Any valid subcode, project or purpose within those account constraints can be utilized. Below is a brief description of each responsibility:

PC Business Administrator Redistribution – allows user to inquire and redistribute PCard charges against their designated department accounts within the 02, 03, 04, 05 and 09 entities only. Select the **Pre-Transaction Log Only** check box for users that will only have access to the Pre-Transactions log and will NOT be monitoring or redistributing daily PCard charges.

PC Operating Redistribution - allows user to inquire and redistribute PCard charges against their designated department accounts within the 02 and 03 entities only. Select the **Pre-Transaction Log Only** check box for users that will only have access to the Pre-Transactions log and will NOT be monitoring or redistributing daily PCard charges.

PC Operating/Grants Redistribution- allows user to inquire and redistribute PCard charges against their designated department accounts within entities 02 and 05. For inclusion of RDF accounts (04, 3xxxx) please check the associated box. Select the **Pre-Transaction Log Only** check box for users that will only have access to the Pre-Transactions log and will NOT be monitoring or redistributing daily PCard charges.

PC Grants Redistribution - allows user to inquire and redistribute PCard charges against their designated department accounts within the entity 05. For inclusion of RDF accounts (04, 3xxxx) please check the associated box. Select the **Pre-Transaction Log Only** check box for users that will only have access to the Pre-Transactions log and will NOT be monitoring or redistributing daily PCard charges.

PC Restricted Redistribution - allows user to inquire and redistribute PCard charges against their designated department accounts within the 04 and 09 entities only. Select the **Pre-Transaction Log Only** check box for users that will only have access to the Pre-Transactions log and will NOT be monitoring or redistributing daily PCard charges.

PCard View Only – allows users to inquire on only those PCard charges made by cardholders as designated in the auditing section of the user form.

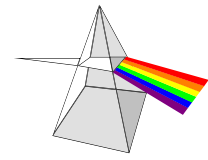
2. Select the appropriate user type. Below is a brief description of each user type:

Cardholder Only – allows the user to inquire on and/or redistribute their own PCard transactions.

Cardholder/Auditor - allows the user to inquire on and/or redistribute their own PCard transactions as well as those designated in the following section.

Auditor Only – allows the user to inquire on and/or redistribute those cardholder transactions designated in the following section (non PCard holder).

3. For those accounts the requestor wishes to audit, the cardholder section must be completed. These are the PCard accounts that the user will be able to view and/or redistribute charges on-line. Enter the Cardholder Name as it appears on the Purchasing Card. Then enter the department name of each cardholder.



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Page 5 – Special Access Responsibility Request:

1. Select the appropriate responsibilities and one action (Add or Delete) for each responsibility selected.

Budget Modification Reports – allows a user to enter budget modification requests (BMRs) on-line for entities 02 and 03 only.

RPA Account Activation Inquiry - allows a user to view, print and save PDF versions of Sponsored Projects Account Activation Reports.

2. The University has archived several years of General Ledger data. For FY04 and prior, GL data must be access using separate responsibilities as listed below.

GLA Business Admin Archive Inquiry - allows a user to view GL transactions in all subcodes, including payroll, and to submit and view GL reports for all departmental accounts within entities 02, 03, 04, 05 and 09.

GLA Operating Archive Inquiry - allows a user to view GL transactions in all subcodes, including payroll, and to submit and view GL reports for all departmental accounts within entities 02 and 03.

GLA Operating/Grants Archive Inquiry - allows a user to view GL transactions in all subcodes, including payroll, and to submit and view GL reports for all departmental accounts within entities 02 and 05.

GLA Grants Archive Inquiry - allows a user to view GL transactions in all subcodes, including payroll, and to submit and view GL reports for all departmental accounts within entity 05.

GLA Restricted Archive Inquiry - allows a user to view GL transactions in all subcodes, including payroll, and to submit and view GL reports for all departmental accounts within entities 04 and 09.

2. The Special Entity Requests box is provided for access to entities not listed or not listed in the appropriate combination. If the request requires such access the box may be completed, however appropriate justification must also be included. This area is to be used for both General Ledger and Purchasing access. Any requests are subject to final approval by the Security Application System Administrator.
3. In March 2017, the University implemented the Concur Travel and Expense system. Access to this system is automatically granted to employees and currently enrolled students, however if a non-Pitt employee needs access to the system to book travel or enter expenses for Pitt employees, they must apply for access. The Non-Pitt section should be completed on page one as well as the **Non-Pitt Employee Access For Concur Travel & Expense** section on this page.

For more information on the Concur Travel & Expense System, please visit the PantherExpress Travel & Expense Management website at <http://pext.pitt.edu/>.