

PBCS Access Information Form

Please complete the following form to establish or modify access to PBCS applications. Once completed, email the form to helpdesk@pitt.edu. Please refer to our website at <https://www.technology.pitt.edu/prism-planning-and-budgeting-cloud-solution-pbcs>.

Please choose one: New User Existing User Access Termination

Effective Date: _____

Requester: _____

Print full "Legal" Name: _____

Department or Division Name: _____ Responsibility Center #: _____

Preferred Email Address: _____

My Current University Computer Account (MyPitt/Pitt Passport) is: _____

Access to Mirror (list existing user to mirror for new user): _____

Additional Comments: _____

Authorization:
As the requester, I affirm that I have read and understand University Computing, Information, and Data Policies:
10-02-04 (<https://www.policy.pitt.edu/computer-data-administration-10-02-04>)
10-02-05 (<https://www.policy.pitt.edu/computer-access-and-use-10-02-05>)
10-02-06 (<https://www.policy.pitt.edu/university-administrative-computer-data-security-and-privacy-10-02-06>)
and will abide by these policies, and use the requested data access only as required in the performance of my University duties.

As the supervisor for the requester, I affirm this request is in accordance with the requester's job function. I will be responsible for taking the appropriate change action, if the requester has a change in employment status.

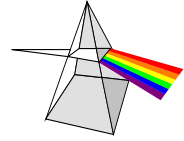
Requester Signature: _____ Date: _____ Phone: _____

Supervisor Printed Name: _____

Supervisor Signature: _____ Date: _____ Phone: _____

Authorized RC Signature: _____ Date: _____ Phone: _____

ERP Financials USE ONLY
 Add/Remove PBCS User Add/Remove PBCS Role(s) Add/Remove PRISM Resp. Completed:



PBCS Access Information Form

Please choose the necessary responsibilities and access level for each application within Oracle Planning & Budgeting Cloud Service. More information for Grants Forecasting can be found on our SharePoint site at <https://pitt.sharepoint.com/sites/PBCS>.

Operating Funds and Grants Forecasting

Two distinct applications are available for creating and maintaining compensation and non-compensation expenses for University sponsored projects and other non-grant entities. Summary grant projections are imported nightly into the Operating Funds module to provide a complete view of expected expenses. Both applications export data to the Tableau Fiscal Panther dashboard collection for overall reporting. Users will have access to salary and hourly rate information for their respective rosters or for any employees that have distributions to their department accounts.

Operating Funds (Entities 02, 03, 04, 06, 09)

Choose **ONLY** One: Add Access Add View Only Access Remove Access

Entities (choose as many as applies): 02 03 04 06 09

No Employee Information

This option will remove all employee roster and forecast options and only allow forecasting at the subcode/non-compensation level.

Allow Subcode Enhanced Detail

This option will add an additional dimension to the subcode form to allow projection one level beyond the reference segment of the GL account. It is in PBCS only and not part of GL. This should only be selected if you require forecasting beyond the GL account number.

Security Group (SO, RC, Department Group or individual departments)

Grants (Entity 05 only)

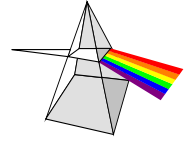
Choose **ONLY** One: Add Access Add View Only Access Remove Access

Security Group (SO, RC, Department Group or individual departments)

ERP Financials USE ONLY

Add/Remove Identity Domain User/Role Add/Remove Security Groups Completed:

Group Names: _____



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Annual Operating (02/03) Budget Process

Once a year, in August and September, the annual budget for 02/03 entities for the fiscal year that started in July is created and imported into the GL for fiscal year accounting. Subsequent changes are initiated and maintained in PRISM GL. Access is typically at the RC level only (but can be at a department group or individual department level) and each RC is required to enter a budget based on the Target Letter received from Budget & Planning (PittPlan).

1. Choose Annual Budget User or Reporting Only

Annual Budget User (includes ability to run Budget Load and Standard Financial Reports)

- Choose **ONLY** One: Add Edit/Write Access Add View Only Access Remove Access
- Select as many as applies:
 - Budget Delegator, Reconciler, and Approver (only one approver per RC; cannot have View Only Access), or
 - Budget Entry Forms, and/or
 - Additional Budget Reconciler (applicable to 02 accounts only and user must have access to the whole RC)

Reporting Only (Budget Load and Standard Financial Reports)

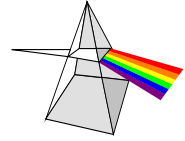
- Choose **ONLY** One: Add View Only Access Remove Access

2. Choose Entities (annual budget applies to 02/03, reporting for other entities)

Select as many as applies: 02 03 04 05 06 09

3. Indicate Security Group (SO, RC, Department Group or individual departments)

Budget & Planning USE ONLY	
<input type="checkbox"/> Add/Remove Security Groups	Completed:
Group Names: _____	



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RC Resource Proposal – RCRP

Beginning in late fall/early winter, RCRPs are the first step in the budget formulation process for the next fiscal year. The RCRP process is an opportunity for RCs to consider how to leverage and realign resources to further strategic priorities that advance the Plan for Pitt. RCRPs include three components: (1) Operating Budget; (2) Strategic Resource Requests; and (3) Capital Budget Requests.

RC Business Manager/Delegate

Choose **ONLY** One: Add Access Add View Only Access Remove Access

Security Group (SO, RC/School level)

Budget & Planning /Controller’s Office USE ONLY

Add/Remove Security Groups Completed:

Group Names: _____

Enrollment & Tuition Revenue Budget Process

Prior to FY23, each school was required to input enrollment and tuition projections directly into the PBCS tuition module for the upcoming budget year. For FY23 and forward, entry will be completed centrally and sent to the RCs for review. Reporting is available; only RC Business Managers (and their delegates) should have access.

RC Business Manager/Delegate

Choose **ONLY** One: Add View Only Access Remove Access

Security Group (SO, RC/School level)

SFS USE ONLY

Add/Remove Security Groups Completed:

Group Names: _____
