

# Prime: How to Request Reporting Access to Sponsored Research Projects

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## 1 Sponsored Research Reporting Access Roles

Role	What this role means for sponsored research
<b>Financial Manager</b>	<ul style="list-style-type: none"> <li>• Among the many rights that Financial Managers have, they can see all sponsored research projects in their home dept.</li> <li>• There can be more than one Financial Manager per dept.</li> </ul>
<b>NOA Recipient</b>	<ul style="list-style-type: none"> <li>• There can be more than one NOA Recipient per dept.</li> <li>• The NOA Recipient can see all sponsored research projects in their home dept.</li> <li>• Receives the NOA from ORPA when new awards have been set up and existing awards have modifications.</li> <li>• Receives the following email notifications for subawards on projects in their department:               <ul style="list-style-type: none"> <li>○ An invoice has been submitted to the Invoice Approver</li> <li>○ An invoice has been approved or pushed back by the Invoice Approver</li> <li>○ An invoice has been waiting for Invoice Approver approval 5 or more days (automatically sent by PS every Monday at 9am)</li> </ul> </li> </ul>
<b>Sponsored Research Report Viewer</b>	<ul style="list-style-type: none"> <li>• Can see sponsored research for projects where this access has been approved.</li> <li>• Access can be requested for all depts, one dept, a subdept or specific projects in the person’s home dept or other depts as per the <a href="#">Prime Financials Access Request Form</a> with the appropriate approval (instructions below).</li> </ul>

## 2 Who can see projects in an award?

<p><b>Award in an academic dept</b></p>	<div style="text-align: center; background-color: #f4a460; padding: 5px; border-radius: 10px; font-weight: bold; font-size: 1.2em; color: white;">Award: Chemistry</div> <div style="margin-top: 10px;"> <div style="border: 1px solid #f4a460; border-radius: 10px; padding: 10px; margin-bottom: 10px;"> <p style="text-align: center; font-weight: bold; margin: 0;">Primary Project – Chemistry, PI: Smith</p> <p style="text-align: center; margin: 0;">NOA &amp; Financial Manager (Chemistry) PI Smith (Primary PI)</p> </div> <div style="border: 1px solid #f4a460; border-radius: 10px; padding: 10px; margin-bottom: 10px;"> <p style="text-align: center; font-weight: bold; margin: 0;">Project 2- Physics, PI: Johnson</p> <p style="text-align: center; margin: 0;">NOA &amp; Financial Manager (Chemistry) NOA &amp; Financial Manager (Physics) PI Smith (Primary PI), PI Johnson</p> </div> <div style="border: 1px solid #f4a460; border-radius: 10px; padding: 10px;"> <p style="text-align: center; font-weight: bold; margin: 0;">Project 3 – MolBio, PI: Sullivan</p> <p style="text-align: center; margin: 0;">NOA &amp; Financial Manager (Chemistry) NOA &amp; Financial Manager (MolBio) PI Smith (Primary PI), PI Sullivan</p> </div> </div>
<p><b>Primary Project</b> – These users can see the entire Award &amp; all Projects within the Award:</p> <ul style="list-style-type: none"> <li>• Primary PI</li> <li>• Financial Manager</li> <li>• NOA Recipient</li> </ul>	
<p><b>Non-Primary Project</b> – These users can see the specific Project only:</p> <ul style="list-style-type: none"> <li>• Project PI</li> <li>• Financial Manager</li> <li>• NOA Recipient</li> </ul>	
<p><b>Specific Projects</b> – Additional access to specific projects may be granted via the Sponsored Research Report Viewer role on the Prime Financials Access Request form.</p>	

<p><b>Award in a center or program</b></p>	<div style="text-align: center; background-color: #f4a460; padding: 5px; border-radius: 10px; font-weight: bold; font-size: 1.2em; color: white;">Award: PRISM</div> <div style="margin-top: 10px;"> <div style="border: 1px solid #f4a460; border-radius: 10px; padding: 10px; margin-bottom: 10px;"> <p style="text-align: center; font-weight: bold; margin: 0;">Primary Project– PRISM, PI: Smith (EE)</p> <p style="text-align: center; margin: 0;">NOA &amp; Financial Manager (PRISM) NOA &amp; Financial Manager (EE) PI Smith (Primary PI)</p> </div> <div style="border: 1px solid #f4a460; border-radius: 10px; padding: 10px; margin-bottom: 10px;"> <p style="text-align: center; font-weight: bold; margin: 0;">Project 2- PRISM, PI: Johnson (Physics)</p> <p style="text-align: center; margin: 0;">NOA &amp; Financial Manager (PRISM) NOA &amp; Financial Manager (EE) NOA &amp; Financial Manager (Physics) PI Smith (Primary PI), PI Johnson</p> </div> <div style="border: 1px solid #f4a460; border-radius: 10px; padding: 10px;"> <p style="text-align: center; font-weight: bold; margin: 0;">Project 3 – PRISM, PI: Sullivan (MolBio)</p> <p style="text-align: center; margin: 0;">NOA &amp; Financial Manager (PRISM) NOA &amp; Financial Manager (EE) NOA &amp; Financial Manager (MolBio) PI Smith (Primary PI), PI Sullivan</p> </div> </div>
<p><b>Primary Project</b> – These users can see the entire Award &amp; all Projects within the Award:</p> <ul style="list-style-type: none"> <li>• Primary PI</li> <li>• Center Financial Manager</li> <li>• Center NOA Recipient</li> <li>• Primary PI's Financial Manager</li> <li>• Primary PI's NOA Recipient</li> </ul>	
<p><b>Non-Primary Project</b> – These users can see the specific Project only:</p> <ul style="list-style-type: none"> <li>• Project PI</li> <li>• Financial Manager</li> <li>• NOA Recipient</li> </ul>	
<p><b>Specific Projects</b> – Additional access to specific projects may be granted via the Sponsored Research Report Viewer role on the Prime Financials Access Request form.</p>	

### 3 You work in a central administrative office and need access to all sponsored research projects in all depts

#### Function(s)

- A/P Exceptions Contact   
  Approver   
  Financial Manager   
  Journal Creator   
  Requisition Creator  
 Receiver   
  Report Viewer   
  NOA Recipient   
 Sponsored Research Report Viewer

- Reporting only requires a ChartField designation; Approvers require a ChartField designation plus a dollar threshold.
- Requests for Project access and the NOA Recipient function will be routed to ORPA for additional review and approval.
- A/P Exceptions Contacts, Financial Managers, and NOA Recipients require specific DEPARTMENT(S) to be designated in the ChartField Access section below.

#### ChartField Access and Thresholds (for approvals and reporting only)

	ENTER CHARTFIELD TO APPROVE/REPORT	REPORTING	\$.01 - \$2,499.99	\$2,500 - \$4,999.99	\$5,000.00 - \$24,999.99	\$25,000 +
All Departments in ORGANIZATION		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All Departments in GROUP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Department		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Department		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program		<input type="checkbox"/>	N/A	N/A	N/A	N/A
Program		<input type="checkbox"/>	N/A	N/A	N/A	N/A
Project	all sponsored	<input checked="" type="checkbox"/>	N/A	N/A	N/A	N/A
Project		<input type="checkbox"/>	N/A	N/A	N/A	N/A

- ✓ In this example, you work in a central administration dept and need access to all sponsored research projects in all depts.
- ✓ Please fill out the [Prime Financials Access Request Form](#).
- ✓ Check off "Sponsored Research Report Viewer".
- ✓ Then in the project row, type "all sponsored" and check off the Reporting box.
- ✓ Sign it, have your departmental approver sign it, and then submit it to the Financial Services Center as per the form.

## 4 You work in an academic dept, program, or center, and need access to all projects in your dept, program or center

### Function(s)

- A/P Exceptions Contact   
  Approver   
  Financial Manager   
  Journal Creator   
  Requisition Creator  
 Receiver   
  Report Viewer   
  NOA Recipient   
 Sponsored Research Report Viewer

- Reporting only requires a ChartField designation; Approvers require a ChartField designation plus a dollar threshold.
- Requests for Project access and the NOA Recipient function will be routed to ORPA for additional review and approval.
- A/P Exceptions Contacts, Financial Managers, and NOA Recipients require specific DEPARTMENT(S) to be designated in the ChartField Access section below.

Enter your main dept number here. This will give you sponsored research access to all projects in your main dept and all your subdepts.

### ChartField Access and Thresholds (for approvals and reporting only)

	ENTER CHARTFIELD TO APPROVE/REPORT	REPORTING	\$.01 - \$2,499.99	\$2,500 - \$4,999.99	\$5,000.00 - \$24,999.99	\$25,000 +
All Departments in ORGANIZATION	23300	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All Departments in GROUP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Department		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Department		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program		<input type="checkbox"/>	N/A	N/A	N/A	N/A
Program		<input type="checkbox"/>	N/A	N/A	N/A	N/A
Project		<input type="checkbox"/>	N/A	N/A	N/A	N/A
Project		<input type="checkbox"/>	N/A	N/A	N/A	N/A
NOTES						

- ✓ In this example, you work in a dept, program, or center and need access to all sponsored research projects in that dept.
- ✓ Please fill out the [Prime Financials Access Request Form](#).
- ✓ Check off "Sponsored Research Report Viewer".
- ✓ If you want to receive the NOA for every new award and existing award modification, check off the NOA Recipient box too.
- ✓ If you are Financial Manager for your dept, check off that box too.
- ✓ Then in the "All Departments in ORGANIZATION" row, enter the main dept number and check off the Reporting box. This will give you sponsored research access to all projects in your main dept and all your subdepts.
- ✓ Sign it, have your departmental approver sign it, and then submit it to the Financial Service Center as per the form.

## 5 You work in a dept and need access to all projects in just one of your dept's subunits

### Function(s)

- A/P Exceptions Contact   
  Approver   
  Financial Manager   
  Journal Creator   
  Requisition Creator  
 Receiver   
  Report Viewer   
  NOA Recipient   
 Sponsored Research Report Viewer

- Reporting only requires a ChartField designation; Approvers require a ChartField designation plus a dollar threshold.
- Requests for Project access and the NOA Recipient function will be routed to ORPA for additional review and approval.
- A/P Exceptions Contacts, Financial Managers, and NOA Recipients require specific DEPARTMENT(S) to be designated in the ChartField Access section below.

### ChartField Access and Thresholds (for approvals and reporting only)

	ENTER CHARTFIELD TO APPROVE/REPORT	REPORTING	\$.01 - \$2,499.99	\$2,500 - \$4,999.99	\$5,000.00 - \$24,999.99	\$25,000 +
Access to all projects in one subdept	All Departments in ORGANIZATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	All Departments in GROUP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Department	26027	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Department		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Program		<input type="checkbox"/>	N/A	N/A	N/A
	Program		<input type="checkbox"/>	N/A	N/A	N/A
	Project		<input type="checkbox"/>	N/A	N/A	N/A
	Project		<input type="checkbox"/>	N/A	N/A	N/A

- ✓ In this example, you work in WWS, 26000, but you only need access to the ISS subdept, 26027.
- ✓ Please fill out the [Prime Financials Access Request Form](#).
- ✓ Check off "Sponsored Research Report Viewer".
- ✓ If you want to receive the NOA for every new award and existing award modification for that subdept, check off the NOA Recipient box too
- ✓ Then in the "Department" row, enter the subdept number and check off the Reporting box. This will give you sponsored research access to all projects in that subdept.
- ✓ Sign it, have your departmental approver sign it, and then submit it to the Financial Service Center as per the form.

## 6 You need access to several but not all projects in a dept (faculty assistant, or projects where your professor's project is owned by another dept)

### Function(s)

- A/P Exceptions Contact   
  Approver   
  Financial Manager   
  Journal Creator   
  Requisition Creator  
 Receiver   
  Report Viewer   
  NOA Recipient   
 Sponsored Research Report Viewer

- Reporting only requires a ChartField designation; Approvers require a ChartField designation plus a dollar threshold.
- Requests for Project access and the NOA Recipient function will be routed to ORPA for additional review and approval.
- A/P Exceptions Contacts, Financial Managers, and NOA Recipients require specific DEPARTMENT(S) to be designated in the ChartField Access section below.

### ChartField Access and Thresholds (for approvals and reporting only)

	ENTER CHARTFIELD TO APPROVE/REPORT	REPORTING	\$ .01 - \$2,499.99	\$2,500 - \$4,999.99	\$5,000.00 - \$24,999.99	\$25,000 +
All Departments in ORGANIZATION		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All Departments in GROUP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Department		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Department		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program		<input type="checkbox"/>	N/A	N/A	N/A	N/A
Program		<input type="checkbox"/>	N/A	N/A	N/A	N/A
Project	See Notes	<input checked="" type="checkbox"/>	N/A	N/A	N/A	N/A
Project		<input type="checkbox"/>	N/A	N/A	N/A	N/A

#### NOTES

Please grant sponsored research reporting access to the following projects:  
 10001234, 10001235, 10007890, 10004567, 10004321, 10007777

- In this example, you need access to several but not all projects. For example, you're a faculty assistant and only need to see your faculty member's projects, or you work in one dept and your professor has several projects that are owned by another dept.
- Please fill out the [Prime Financials Access Request Form](#).
- Check off "Sponsored Research Report Viewer".
- Then in the "Project" row, enter "See Notes" and check off the Reporting box. In the Notes box, enter all the project numbers that you need access to. This will give you sponsored research access to just those projects. Or, you can attach a print out of the projects you need access to.
- Sign it, have the departmental approver **for the dept that owns the projects** sign it, and then submit it to the Financial Service Center as per the form. For example, if you work in chemistry but you need rights to projects in PRISM and physics, you would have to have the dept approver in PRISM approve your access to PRISM projects, and have the dept approver in physics approve your access to physics projects.

## 7 You need access to just one or two projects (faculty assistant, or projects where your professor's project is owned by another dept)

### Function(s)

- A/P Exceptions Contact   
  Approver   
  Financial Manager   
  Journal Creator   
  Requisition Creator  
 Receiver   
  Report Viewer   
  NOA Recipient   
 Sponsored Research Report Viewer

- Reporting only requires a ChartField designation; Approvers require a ChartField designation plus a dollar threshold.
- Requests for Project access and the NOA Recipient function will be routed to ORPA for additional review and approval.
- A/P Exceptions Contacts, Financial Managers, and NOA Recipients require specific DEPARTMENT(S) to be designated in the ChartField Access section below.

### ChartField Access and Thresholds (for approvals and reporting only)

	ENTER CHARTFIELD TO APPROVE/REPORT	REPORTING	\$ .01 - \$2,499.99	\$2,500 - \$4,999.99	\$5,000.00 - \$24,999.99	\$25,000 +	
Need access to just one or two projects	All Departments in ORGANIZATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	All Departments in GROUP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Program	<input type="checkbox"/>	N/A	N/A	N/A	N/A	
	Program	<input type="checkbox"/>	N/A	N/A	N/A	N/A	
	Project	10001234	<input checked="" type="checkbox"/>	N/A	N/A	N/A	N/A
	Project	10001235	<input checked="" type="checkbox"/>	N/A	N/A	N/A	N/A

- ✓ In this example, you need access to just one or two projects. For example, you're a faculty assistant or you work in one dept and your professor has a project that is owned by another dept.
- ✓ Check off "Sponsored Research Report Viewer".
- ✓ Then in the "Project" row, enter the project number and check off the Reporting box. This will give you sponsored research access to all projects in that subdept.
- ✓ Sign it, have the departmental approver **for the dept that owns the project** sign it, and then submit it to the Financial Service Center as per the form.

## 8 You've requested access; now what?

- ✓ The Financial Service Center will grant access for Financial Managers and let you know when that access has been granted.
- ✓ The Financial Service Center will grant Sponsored Research Report Viewer access if you are requesting access for all depts, a main dept or sub dept. The FSC will let you know when the access has been granted.
- ✓ For NOA Recipient for any dept or Sponsored Research Report viewer for specific projects, the FSC forwards the request on to ORPA. A member of ORPA staff will get back to you when your access has been granted.
- ✓ Access takes overnight to go into effect; access granted on a Monday will be available on Tuesday morning.