PantherExpress User Profile Form Instructions

Introduction:

The PantherExpress User Profile Form must be filled out in order to obtain access to the PantherExpress System. All users in PantherExpress are classified under three roles: Shopper, Department Buyer, and Approver. Please read the "Role Explanations" section below to determine which role(s) you will have in PantherExpress. This form must be downloaded first, in order to access the editable fields. When this form is completed, please email it to pantherbuy@cfo.pitt.edu. If you have any questions regarding this form, please contact customer service HERE or check our website, found at https://www.ppt.pitt.edu/help-training/system-access-training. You must also submit a conflict disclosure through MyDisclosures to comply with the University's Conflict of Interest policy: https://www.coi.pitt.edu/mydisclosures.

User Training Requirements:

Users registering to be an Approver or Department Buyer must attend PantherExpress training and are required to complete the required training. Users will be registered for the proper training. You will receive an email from the Learning Management System once you have been registered for the proper training.

Policy:

It is University Policy that if a PantherExpress user has not accessed the system for *6 months or longer*, the user will have to retake the appropriate training(s) according to his/her role(s) in PantherExpress. This is due to the system upgrades that occur throughout the year and the changes that are made to the various screens and software functions.

Role Explanations:

Shopper ONLY – A shopper has the ability to log into PantherExpress, search the hosted catalogs and vendor punchouts, and place items into a shopping cart. The shopper DOES NOT have the ability to apply an account number to an order. The cart and its contents will be sent to the designated Account Assigner(s) to review the order, attach the appropriate account information, and submit the order to the Departmental Approval workflow. **NOTE**: Shoppers WILL NOT be given access to the *Specialty Forms*.

Department Buyer – A Department Buyer has the ability to log into PantherExpress, search the hosted catalogs and vendor punchouts, place items into shopping carts, and submit the orders to the supplier for fulfillment. The Department Buyer is NOT restricted like the shopper role. Buyers can and must attach an account number to their orders. A dollar *Spending Limit* is required and can be indicated as Level 1 ($0), Level 2 ($500), Level 3 ($5,000), or Level 4 ($10,000). *Standard Forms Access* will provide the buyer with additional access to the Non-Catalog, Blanket, and Software forms. This is covered during the in-class training with Balazs Kudelasz, but additional online training is available for Buyers who do not have this access. *Specialty Forms Access* will provide the Buyer with access to the Conference and Event, Dues, Other Payment, PSA, Refunds, Supplier Agreement, and Research Sub-Contract forms.

Specialty Forms ONLY – The Specialty Forms ONLY role will provide the user with the ability to access and use the Specialty Forms (Conference and Event, Dues, Other Payment Request, PSA, Refunds, Supplier Agreement, Research Sub-Contracts). The Specialty Forms ONLY role does NOT provide the user with buying abilities, and he/she will not have access to punchouts, hosted catalogs, or standard forms. Any transaction placed will go to a designated 2nd signature approver that is listed on the form.

Department Approver – An Approver is an individual who has been granted permission by his/her department to review and approve orders submitted by Shoppers and Department Buyers in PantherExpress. Users who are only Approvers do not have the ability to purchase items. If you plan to both approve and purchase items for yourself and others, you must indicate that you will be both an Approver and Department Buyer. Additionally, a **Department Approval Form** must be filled out and submitted to indicate the codes for which you will be granted approving authority. This form can be downloaded HERE. Note: the form must be downloaded in order to access the editable fields.

Form Instructions:

Shopper ONLY – If you are signing up to be a Shopper in the PantherExpress system, you are only required to complete fields 1-7, 10 (if applicable), and 13-14. The remainder of the form does not apply to you. If your department has not already set up Account Assigners for its Shoppers, you must complete the Account Assignment section of the Department Approval Form. Note: the form must be downloaded in order to access the editable fields.

1. Select the type of access request: New User, Existing User, or Access Termination. Access Termination will only apply to the PantherExpress system.

2. Enter full name. This is the full name of the person requesting access to PantherExpress.

3. Enter the **@pitt.edu** email address of the person requesting access.

4. Enter the office phone number of the person requesting access.

5. Enter your University Computer ID Name here (Ex: RJH35). This is the name that precedes your @pitt.edu email address (ex: RJH35@pitt.edu). If you do not know this name, contact your RC Account Administrator (found at https://acct-prod.cssd.pitt.edu/Account/ResponsibilityCenterAdministrators). This is also the name used to log into the my.pitt.edu portal.

6. Enter the Full Name of your Department.

7. Indicate the DEFAULT Shipping Address. This is the address where all or most of your orders will be delivered.

8. From the "Roles" list - Select the Shopper ONLY role. (Note: Do NOT indicate account codes in section 11 & 12. You will not be granted access to any account codes as a Shopper.)

9. Signatures from both the Shopper and the department administrator or supervisor are required on the form. The RC signature is not required to be granted "Shopper ONLY" access.

*Note: DO NOT fill out 15-16. They are for internal use only.

Department Buyer, Specialty Forms and Approver Section – If you are registering to be a Department Buyer and/or an Approver in the PantherExpress system, please use the following instructions:

1. Select the type of access request: New User, Existing User, or Access Termination. Access Termination will only apply to the PantherExpress system.

2. Enter full name. This is the full name of the person requesting access to PantherExpress.

3. Enter the **@pitt.edu** email address of the person requesting access.

4. Enter the office phone number of the person requesting access.

5. Enter your University Computer ID Name here (Ex: RJH35). This is the name that precedes your @pitt.edu email address (ex:RJH35@pitt.edu). If you do not know this name, contact your RC Account Administrator (found at

https://www.ppt.pitt.edu/sites/default/files/rcapproverlist.pdf). This is also the name used to log into the my.pitt.edu portal.

6. Enter the Full Name of your Department.

7. Indicate the DEFAULT Shipping Address. This is the address where all or most of your orders will be delivered.

8. List the person who is your 2nd Signature Approver for all of your Specialty Forms orders. This information is **required** for Specialty Forms Access. The 2nd Signature Approver must be the direct supervisor, manager, or administrator of the user listed on this form. The person who will be approving the user's Specialty Forms order must have access to the PantherExpress System and he/she must have the Approver role. If your 2nd Signature Approver is not a PantherExpress user and/or is not an Approver, please submit a User Profile Form for him/her requesting the appropriate access.

9. Enter all of the Entity and Department codes that the user will need to access.

10. Indicate the DEFAULT 32 Digit Account Code you will be using. This is the code you will be using most often. Pitt uses a 32 Digit Account Code System. It is broken into seven segments: Entity Code, Department Code, Subcode, Purpose Code, Project Code, Departmental Reference Code, and Future Reference Code. DO NOT LEAVE THIS SECTION BLANK.

11. Select which role(s) this user will have (see "Role Explanations" above). (Note: Department Buyers **must** indicate a Spending Limit). Indicate additional access to *Standard* and/or *Specialty Forms*. A Departmental Approval Form should be completed in addition to this form when adding a new Approver or Account Assigner.

12. Please have the person requesting PantherExpress access, his/her supervisor or administrator, and the authorized RC for your area sign the form on the appropriate line. Authorized RC designates are individuals who are permitted to sign for the RC head or the Business Administrator at the responsibility center level. If you do not know the name of this individual for your department, please contact customer service HERE. Access will not be granted until all the appropriate signatures are on the form and all training requirements are completed.

13. Enter any comments or requests.

14. Do not fill out – internal use ONLY.

15. Do not fill out – internal use ONLY.

PantherExpress   **User Profile Form**

Please choose one: ☐ New User   ☐ Existing User   ☐ User Access Termination

Name: _____   **@pitt.edu** Email: _____
                                                                            (@ pitt.edu email address is required)

Phone: _____   Primary University Computer ID: _____

Department Name: _____

Default Ship-to Location: _____

List your 2nd Signature Approver:_____

                                                                                                                            ☐

List the Entity Code(s) you will need to access: *(use an asterisk (*) to denote all values for a particular digit)*

Entity Examples: 02 05 03 *

_____   _____   _____   _____   _____ _____

List the Department Code(s) you will need to access: *(use an asterisk (*) to denote all values for a particular digit)*

Department Examples: 02070 35207 932**   (Attach separate sheet for additional Departments if necessary)**

_____   _____   _____   _____   _____   _____   _____

User's 32 Digit Default Account Number (Entity and Department must be listed above)
DO NOT USE ASTERISKS

Entity	Department	Subcode	Purpose	Project	Dept. Ref.	Future Ref.

What ROLE(S) will this person have? DO NOT LEAVE BLANK

☐ **Shopper ONLY** (NO account code access)

☐ **Department Buyer** (select a **required** *Spending Limit* and additional *Forms Access* if required)

  ☐ **Level 1 ($0 Spending Limit)** ☐ **Level 2 ($500 Spending Limit)** ☐ **Level 3 ($5,000 Spending Limit)** ☐ **Level 4 ($10,000 Spending Limit)**
  ☐ **Standard Forms Access** (Blanket/Standing Order, Software, Non-Catalog)
  ☐ **Specialty Forms Access** (Conference and Event, Dues, Other Payment, PSA, Refunds,
            Supplier Agreement, Research Sub-Contract)

☐ **Specialty Forms ONLY** (Conference and Event, Dues, Other Payment, PSA, Refunds, Supplier Agreement,
            Research Sub-Contract)

☐ **Department Approver/Account Assigner**

> **If you will be the Department Approver and/ or Account Code Assigner, please check the appropriate role box on the left and fill out the required Departmental Approval form.**

Revised, March 31, 2021

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.

User's Signature: _____ **Date:** _____ **Phone:** _____

Supervisor's Printed Name: _____

Supervisor's Signature: _____ **Date:** _____ **Phone:** _____

Authorized RC's Printed Name: _____

Authorized RC's Signature: _____ **Date:** _____ **Phone:** _____

Comments:

ASA Approval: _____ **Date:** _____

FIS USE ONLY   ☐ **PRISM Responsibility Setup**   ☐ **Placed in Portal Group**   ☐ **Non-Pitt Access Setup**

Completed: _____ **Date:** _____ **RC:** _____