PantherExpress User Profile Form Instructions

Introduction:
The PantherExpress User Profile Form must be filled out to obtain access to the PantherExpress System. All users in PantherExpress are classified under three roles: Shopper, Department Buyer, and Approver. Please read the roles explanation section below to determine which role(s) you will have in PantherExpress. When this form is completed, please fax it to the PantherExpress team, 412-624-5278 or mail it to us, 3309 Cathedral of Learning. If you have any questions regarding this form, please contact customer service HERE or check our website, found at http://cfo.pitt.edu/pexpress/pbuytraining.php. You must also fill out a Conflict of Interest form found at http://www.cfo.pitt.edu/pexpress/documents/CONFLICTOFINTERESTCERTIFICATION.pdf.

User Training Requirements:
All those registering as an Approver or Buyer must attend PantherExpress training, and are required to complete Purchasing Fundamentals. The course is offered online and you are able to take it at your convenience. For the online Purchasing Fundamentals training email Cathy Lewis at clewis@cfo.pitt.edu to register. Once you are registered, you will receive login information via email. All those registering as a Shopper, must participate in a Shopper Webinar. You can register on our website at: http://cfo.pitt.edu/pexpress/pbuytraining.php. User credentials are not provided until completion of required training.

Policy:
It is 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 class according to their role in PantherExpress. This is due to upgrades occurring in the system, and the changes being made to the various screens and software functions.

Roles Explanation:

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 Standard Forms or Specialty Forms.

Department Buyer – A Department Buyer will have the ability to log into PantherExpress, search the hosted catalogs, and the 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. They can and must attach an account number to their orders. Their dollar Spending Limit can be Level 1 ($0), Level 2 ($500), or Level 3 ($5,000). Standard Forms access will provide the buyer with access to the Non-Catalog, Blanket, and Software forms. Additional online training will be required for current buyers that request access to this role. Specialty Forms access will provide the buyer with access to the Conference, Dues, Guest Speaker, Other Payment, PSA, Refunds, Supplier Agreement, Research Sub-Contracts forms.

Specialty Forms Only – The Specialty Forms Only role will provide the user the ability to access and use the Specialty Forms (Conference, Dues, Guest Speaker, Other Payment, PSA, Refunds, Supplier Agreement, Research Sub-Contracts). The specialty forms only role does NOT provide buying abilities and the user will not have access to punchouts, hosted catalogs or standard forms. Any transaction placed will go to a designated department approver.
**Department Approver** – An Approver is an individual who has been granted permission by their department to review and approve purchase orders submitted in PantherExpress by Shoppers and Department Buyers. Any order under $5,000 will automatically be paid. Any order over $5,000 will not automatically be paid by the system. As per University Policy, after the order is approved by Purchasing Services, payment will be withheld until the product(s) is/are received and the department releases the funds through “Ok to Pay”. **There must be at least one designated “Ok to Pay” approver in each department, however if the department chooses, there may be more than one.** Approvers do not have the ability to purchase items, only approve orders. If you plan to both approve and purchase items for yourself or others, you must indicate that you will be both an Approver and Department Buyer.

**Department Reconciler** – A Department Reconciler is an individual who is responsible to correct invoice order discrepancies.

**2nd Signature Approver** – A 2nd Signature Approver is a University employee who is higher in the requestor’s organizational hierarchy, and who is knowledgeable of the requestor’s work, who is permitted to approve the purchase as a 2nd Signature Approver.

**Form Instructions:**

**Shopper** – If you are signing up as a shopper in the PantherExpress system you only need to complete fields 1-7 and 11 - 13. The remainder of the form does not apply to you. If your department has not already set up account assigners for their shoppers, you must complete the Account Assignment section of the Department Approval Form.

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 needing access.

4. Enter the office phone number of the person needing 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](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. List the person who is your 2nd Signature Approver for all of your orders. The Person will have to have access to the PantherExpress system.

10. Information required for NON Pitt Employees only.

13. From the Roles list - Select the SHOPPER role. (Note: Do NOT indicate Accounting Codes in section 11 & 12)

14. The shopper form needs to have signatures from the shopper and the department administrator or supervisor. The signature of the RC is not required.

15. Do not fill out, internal use ONLY.

16. Do not fill out, 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 needing access.

4. Enter the office phone number of the person needing 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](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. List the person who is your 2nd Signature Approver for all of your orders. The Person will have to have access to the PantherExpress system. This information is required for Specialty Forms access.

9. Indicate the Completion Date for the Purchasing Fundamentals training.

10. Information required for NON Pitt Employees only.

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

12. 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.**

13. Select which role(s) this User will have (see “Roles Explanation” above). (Note: Department Buyers must indicate a Spending Limit). Indicate additional access to Standard and/or Specialty Forms access. A Departmental Approval Form should be completed when adding a new approver, account code assigner or reconciler.

14. Please have the person requesting PantherExpress access, their supervisor or administrator, and authorized RC designate sign the form on the appropriate line. Authorized RC designates are individuals allowed 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.

15. Do not fill out, internal use ONLY.

16. Do not fill out, internal use ONLY.
User Profile Form

Please choose one:  

1. New User  
2. Existing User  
3. User Access Termination

Name: ______________________________________  
Email: ______________________  
Primary University Computer ID: ______________________

Phone: ______________________  
Department Name: ______________________________________

Default Ship-to Location: ______________________  
List your 2nd Signature Approver: ______________________  

Purchasing Fundamentals Completion Date: __________  
Conflict of Interest Form completed: __________

NON Pitt Employees Only:  
1. Female  
2. Male

Birth Date: ______________________  
Sponsored University ID: ______________________

SSN: ______________________  

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**

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

What ROLE(S) will this person have?  

1. Shopper ONLY (NO account code access)

2. 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)

- Standard Forms Access (Blanket/Standing Order, Software, Non-Catalog)
- Specialty Forms Access (Conference, Dues, Guest Speaker, Other Payment, PSA, Refunds, Supplier Agreement, Research Sub-Contract)

3. Specialty Forms ONLY (Conference, Dues, Guest Speaker, Other Payment, PSA, Refunds, Supplier Agreement, Research Sub-Contract)

If you will be the Department Reconciler, Department Approver, and/or Account Code Assigner, please check the appropriate role box(es) on the left, and fill out the required Departmental Approval form.
Authorization:
As the requester, I affirm that I have read and understand University Computing, Information, and Data Policies:
10-02-04  (http://www.cfo.pitt.edu/policies/policy/10/10-02-04.html)
10-02-05  (http://www.cfo.pitt.edu/policies/policy/10/10-02-05.html)
10-02-06  (http://www.cfo.pitt.edu/policies/policy/10/10-02-06.html)
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.

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: ___________

ASA Approval: ____________________________  Date: ____________

FIS USE ONLY

PRISM Responsibility Setup

Placed in Portal Group

Non-Pitt Access Setup

Completed: ____________________________  Date: ____________

Last update July 28, 2015
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: ________________________________________________

Purchasing Fundamentals Completion Date: __________  Conflict of Interest Form completed: □

NON Pitt Employees Only:  □ Female  □ Male

Birth Date: __________________________  Sponsored University ID: ______________________

SSN: __________________________

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

<table>
<thead>
<tr>
<th>Entity</th>
<th>Department</th>
<th>Subcode</th>
<th>Purpose</th>
<th>Project</th>
<th>Dept. Ref.</th>
<th>Future Ref.</th>
</tr>
</thead>
</table>

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)

☐ Standard Forms Access (Blanket/Standing Order, Software, Non-Catalog)

☐ Specialty Forms Access (Conference, Dues, Guest Speaker, Other Payment, PSA, Refunds, Supplier Agreement, Research Sub-Contract)

☐ Specialty Forms ONLY (Conference, Dues, Guest Speaker, Other Payment, PSA, Refunds, Supplier Agreement, Research Sub-Contract)

If you will be the Department Reconciler, Department Approver, and/ or Account Code Assigner, please check the appropriate role box(es) on the left, and fill out the required Departmental Approval form.
Authorization:
As the requester, I affirm that I have read and understand University Computing, Information, and Data Policies:

- 10-02-04 (http://www.cfo.pitt.edu/policies/policy/10/10-02-04.html)
- 10-02-05 (http://www.cfo.pitt.edu/policies/policy/10/10-02-05.html)
- 10-02-06 (http://www.cfo.pitt.edu/policies/policy/10/10-02-06.html)

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.

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: ____________

ASA Approval: ____________________________ Date: _________________

FIS USE ONLY

☐ PRISM Responsibility Setup  ☐ Placed in Portal Group  ☐ Non-Pitt Access Setup

Completed: __________________________________________ Date: ____________________