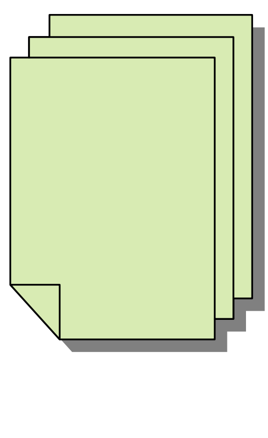
Placing Orders Using the Standard Forms: Non-Catalog, Blanket, Software

Chapter 9



PantherExpress Standard Forms

Section Objectives

At the end of this section, you should be able to:

- Understand the use of the Standard Forms: Non-Catalog, Blanket, Software
- Understand the policies of usage
- Understand items to avoid

Using the Non-Catalog Form

The Non-Catalog Form is used to request items that cannot be found in the PantherExpress electronic or punch-out catalogs.

Note: All University units are required to use contracted suppliers, when available, to purchase goods and services. A listing of these suppliers is provided at:

http://cfo.pitt.edu/pexpress/purchases/contractedSuppliers.php

Common Usage:

The Non-Catalog Form initially is a requisition in this phase of the order process. The form is normally associated with and used to generate orders for:

- Equipment and accessories
- Goods and Supplies
- Controlled Substances (Exceptions –Restricted or Non-standard Commodities, refer to: (http://cfo.pitt.edu/pexpress/restrictedcommodities.php)
- Equipment Repair/Service

Note: Use the PSA form for services valued at $5,000 and above, e.g., programming services, information management, web site development.

When completing the form:

- Before using the Non-Catalog Form, be sure to search the supplier's electronic and/or punch-out catalogs.
- Not all suppliers in PantherExpress are *contracted suppliers* – only those who have a punch-out or hosted catalog are *contracted suppliers*.
- Check to see if the Supplier is in the Supplier database before starting your order. If the supplier is not in the system, please follow the New Supplier process outlined in this manual.
- Do not use this for items available through a contracted supplier in PantherExpress (Punch-out) or when a P-Card is used for the order and payment.
- Do not submit an order with an expired quote. A current quote from the supplier that is valid for at least thirty (30) days is required. NOTE: An invoice is **not** a quote.

This form becomes part of the Purchase Order and will be distributed to the supplier.

Special Instructions for the Non-Catalog Form

When submitting orders greater than $5,000:

Attach all required back-up documentation directly to the requisition before submitting for approval.

- Purchasing Services reviews, approves, and submits the order to the supplier. Purchasing services will be checking that the required documentation is attached to your order.

- Refer to Requisition Checklist found at: *http://cfo.pitt.edu/pexpress/documents/reqchecklist.pdf*

- Do not submit an *incomplete* Directed /Sole Source Justification form *(http://cfo.pitt.edu/pexpress/forms.ph)*. Requester must explain why other suppliers were excluded and proper legible signatures must be included: Dean, Department Chair, or Director. Please indicate title. Requester must sign twice. Print or type names above signatures with title listed.

- If using a Directed or Sole Source Justification Form, the requester or approver must complete the Conflict of Interest forms in HS-Connect before signing the Directed or Sole Source Justification Form.

  Note: Approver must be a Dean, Department Chairperson or Department Director. (Administrators cannot sign on behalf of the Dean, Department Chair or Director.)

- If supplier will be on campus for training, installation, repairs, etc, a Certificate of Insurance *(http://www.cfo.pitt.edu/risk/insuranceRequirements.html)* is required before service is rendered and must be attached to the requisition. The University of Pittsburgh must be named as a Certificate Holder and also as an 'additional insured'.

- Capital Equipment is a single piece of equipment that is over $5,000. Capital Equipment is charged to subcode 6100.

- The University **must** comply with U.S. export regulations. For goods, an *Export Controls Classification*, from the supplier, is required for any single item over $5,000, and can be provided on a quote, or a separate document, such as an email, or on the University's Product Classification Certification form. Make sure you attach this information to your requisition. For services, Export Controls review is needed only in the instance where an item is being sent by the University to a supplier outside of the U.S.

- Contact the Export Controls Team (echelp@pitt.edu), or your Procurement Specialist, if you have questions, or need assistance prior to exporting any item out of the U.S.

Special Instructions for the Non-Catalog Form

Policies associated with the Non-Catalog Form:

All University of Pittsburgh procurement activities are subject to the University's policies and procedures:

Policy 05-02-02 Conflict of Interest and Procurement Relationships
Policy 05-02-03 Code of Ethics
Policy 05-02-14 Authority for Management of Procurement
Policy 05-02-15 Required Use of Contracted Suppliers
Policy 05-02-16 Competitive Bidding

In order to do business or be considered for doing business with the University, suppliers must comply with these policies which include the University's Terms and Conditions. (See Policy 05-02-18 Supplier Code of Conduct and University of Pittsburgh Schools of Health Sciences Industry Relationship Policy).

Placing Orders Using the Non-Catalog Form

Accessing the Standard Forms:

To access the Non-Catalog form:

1. Go to the Home/Shop page.

2. Click on the icon for the Non-Catalog Form.

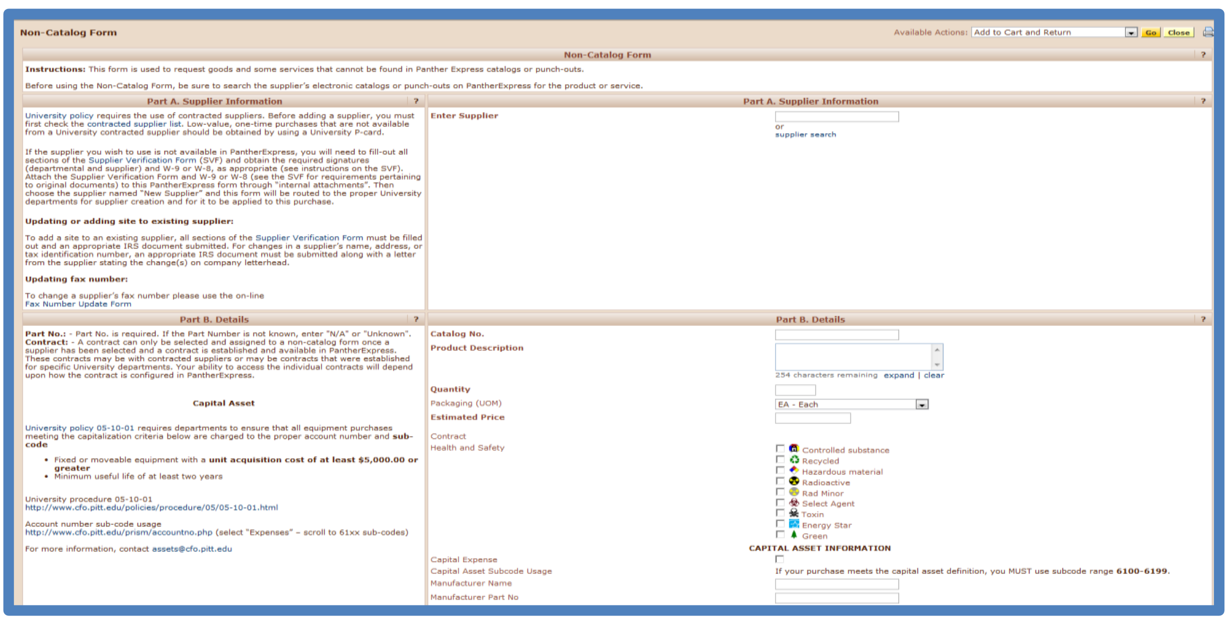
Completing the Non-Catalog Form:

The form is broken into two sections:

- The section on the **right** side of the form contains all of the various fields that may need to be completed while filling out the form.

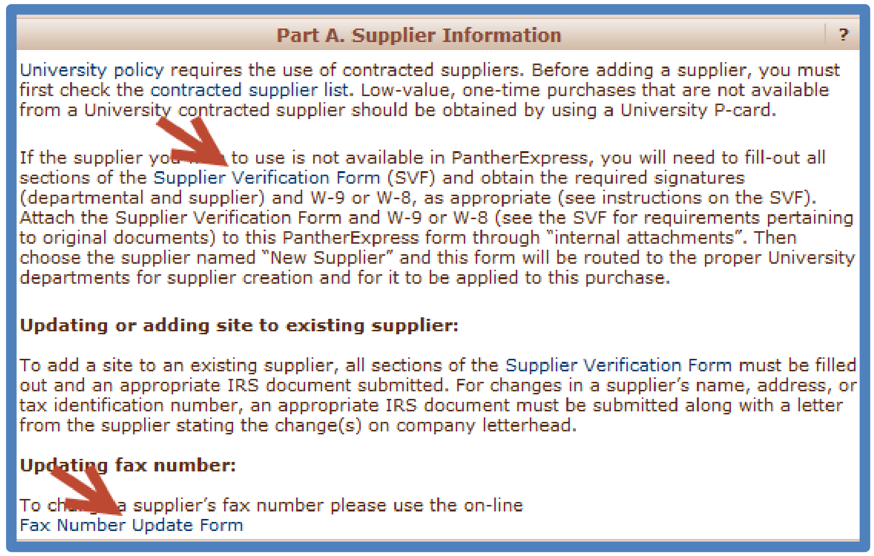
  Note: the Supplier distribution information cannot be left blank. If you do not need to send your order to the supplier, add your own email address as the supplier distribution information into the field.

- The section on the **left** side of the form provides detailed information on how to complete the related fields on the right side of the form. This section is meant to answer most questions you may have related to completing the form.



Placing Orders Using the Non-Catalog Form

The information on the **left** side of the form also contains hyperlinks. These links will take you to additional information that may be vital to you accurately completing the Non-Catalog Form.



Part A. Supplier Information ?

University policy requires the use of contracted suppliers. Before adding a supplier, you must first check the contracted supplier list. Low-value, one-time purchases that are not available from a University contracted supplier should be obtained by using a University P-card.

If the supplier you want to use is not available in PantherExpress, you will need to fill-out all sections of the Supplier Verification Form (SVF) and obtain the required signatures (departmental and supplier) and W-9 or W-8, as appropriate (see instructions on the SVF). Attach the Supplier Verification Form and W-9 or W-8 (see the SVF for requirements pertaining to original documents) to this PantherExpress form through "internal attachments". Then choose the supplier named "New Supplier" and this form will be routed to the proper University departments for supplier creation and for it to be applied to this purchase.

Updating or adding site to existing supplier:

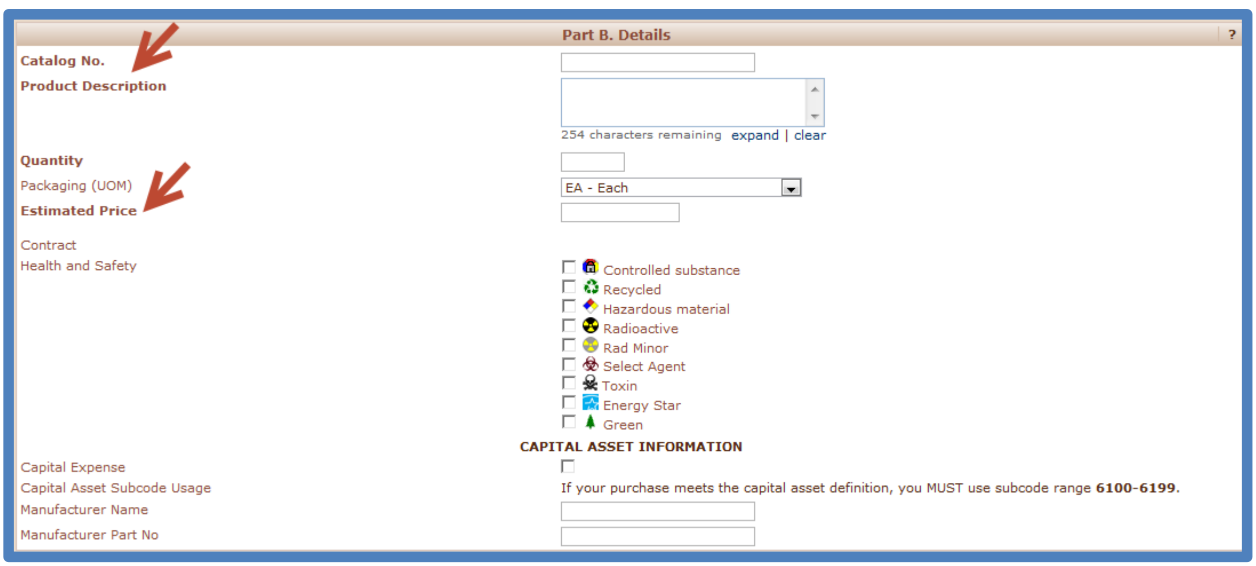
To add a site to an existing supplier, all sections of the Supplier Verification Form must be filled out and an appropriate IRS document submitted. For changes in a supplier's name, address, or tax identification number, an appropriate IRS document must be submitted along with a letter from the supplier stating the change(s) on company letterhead.

Updating fax number:

To change a supplier's fax number please use the on-line Fax Number Update Form

NOTE: All fields on the right hand side of the form that appear to be BOLDED are required.

If one of the required fields is left blank, the system will not allow you to submit the form. You will be required to fill in the missing information before you can submit the form.



Part B. Details ?

Catalog No.

Product Description

254 characters remaining expand | clear

Quantity

Packaging (UOM) EA - Each

Estimated Price

Contract

Health and Safety

- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Rad Minor
- Select Agent
- Toxin
- Energy Star
- Green

CAPITAL ASSET INFORMATION

Capital Expense

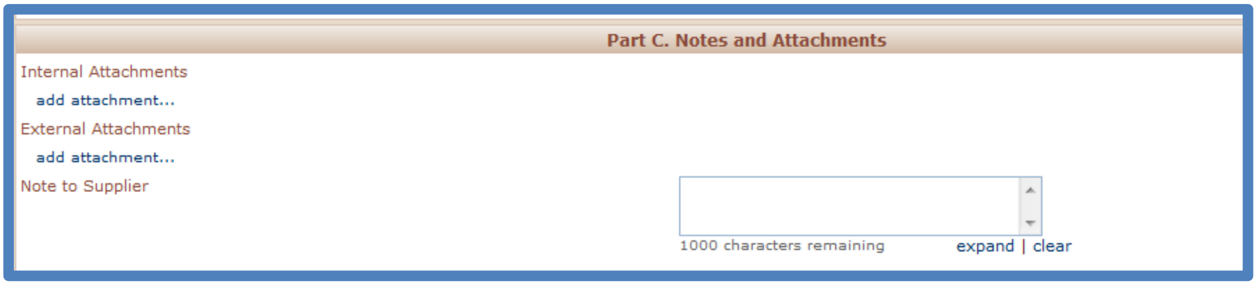
Capital Asset Subcode Usage — If your purchase meets the capital asset definition, you MUST use subcode range **6100-6199**.

Manufacturer Name

Manufacturer Part No

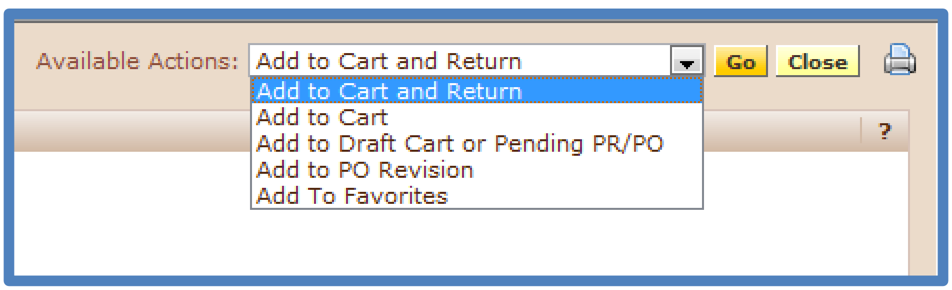
Placing Orders Using the Non-Catalog Form

On the form, you will be asked to fill in all of the required fields, and attach all of the required documentation necessary to process your transaction.



Final submission of the form:

- Once you have filled out all of the required information, and attached required documentation, scroll up to the top of the form.
- The Available Actions drop down box will have “Add to Cart and Return” listed.



- Click on the  button. This will add your Non-Catalog Form to your cart.
- Then click *Close*.
- To complete your Non-Catalog Transaction – click your shopping cart (located at the top right hand of your screen).
- Complete the transaction.

If you have any questions on completing the form, please call the PantherExpress Customer Service Team at 412-624-3578.

Placing Orders Using the Non-Catalog Form

Purchase a Non-Catalog Item

Create an order for a mercury lamp from B&B Microscopes.

PantherExpress N → Home → Forms → Standard Forms → Non-Catalog Form

1. Complete the Non-Standard form with the following information:
   - Supplier — B&B Microscopes
   - Fulfillment Address — Pittsburgh
   - FAX — Default Fax number
   - Catalog # — HB1030W
   - Product Description — 100 Watt Mercury Lamp
   - Quantity — 1
   - Price — $173.55
2. From Available Action drop-down at the top of the form, choose “Add to Cart and Return” and click Go.
   - The line item is added to your cart
   - The form remains open for your next line item
3. Click *Close.*
4. Review the cart by clicking on the cart summary.
5. Click *Open Form* to modify supplier or line item information.
6. Click *Proceed to Checkout.*
7. Enter the appropriate Accounting Codes.
8. Click *Submit Requisition.*

Purchase a Non-Catalog Item that is Capital Equipment (over $5,000) and is being charged to a Grant

Create an order for a camera from B&B Microscopes. The camera is over $5,000 (capital Equipment), and will be charged to a grant account. Attach the required documentation: Supplier Quote, Sole Source Justification form, Export Controls Classification.

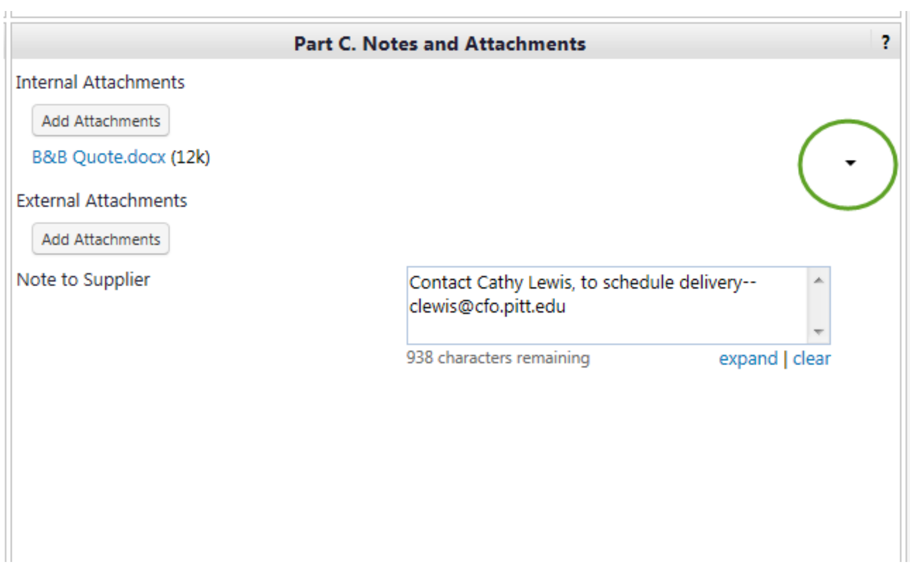
PantherExpress N → Home → Forms → Standard Forms → Non-Catalog Form

1. Complete the Non-Standard form with the following information:
   a. Supplier — B&B Microscopes
   b. Fulfillment Address — Pittsburgh
   c. FAX — Default Fax number
   d. Catalog # — XR2048
   e. Product Description — Rolera XR Monochrome Camera
   f. Quantity — 1
   g. Price — $5,907.00
   h. Capital Expense — Click the Checkbox. Charge to subcode 6100
2. Attach the following as Internal Attachments.
   a. Supplier Quote, including the Export Controls Classification
   b. Sole Source Justification form

Placing Orders Using the Non-Catalog Form

3. From Available Action drop-down at the top of the form, choose "Add to Cart and Return" and click Go.
    a. The line item is added to your cart
    b. The form remains open for your next line item
4. Click *Close.*
5. Review the cart by clicking on the cart summary.
6. Click *Open Form* to modify supplier or line item information.
7. Click *Proceed to Checkout.*
8. Enter the appropriate Accounting Codes.
    a. 05.49010.6100.00000.002691.00000
9. Click *Submit Requisition.*

Note: Attachments can be moved between Internal and External by clicking on the down arrow across from the attachment name.



Using the Blanket/Standing Order Form

The Blanket/Standing Order Form is used to request the creation of a blanket/standing order for recurring, non-catalog purchases of goods and services where the supplier will bill multiple times against the same purchase order number, for a designated period of time or dollar amount**.**

Note: All University units are required to use contracted suppliers, when available, to purchase goods and services. A listing of these suppliers is provided at:

http://cfo.pitt.edu/pexpress/purchases/contractedSuppliers.php

Common Usage:

The Blanket/Standing Order Form initially acts as a requisition in this phase of the order process when the supplier will bill multiple times or for a designated time period or dollar amount:

- Maintenance/Service Agreements
- Repetitive designated deliveries (i.e. gas or ice)
- Repetitive purchase of supplies from same supplier

When completing the form:

- Before using the Blanket/Standing Order Form, be sure to search the supplier's electronic and/or punch-out catalogs.
- Specialty Underwriters LLC is the University of Pittsburgh's contracted supplier for equipment maintenance and service. Contact SU for a competitive quotation before submitting directly to a supplier.
- Not all suppliers in PantherExpress are *contracted suppliers* – only those who have a punch-out or hosted catalog are *contracted suppliers*.
- Check to see if the supplier is in the supplier database before starting your order. If the supplier is not in the system, please follow the New Supplier process outlined in this manual.
- Do not submit an order with an expired quote. A current quote from the supplier that is valid for at least thirty (30) days is required. NOTE: An invoice is **<u>not</u>** a quote.
- The Blanket/Standing PO total should reflect the anticipated dollar amount for the entire length of the agreement and the designated time period. If you have a previous purchase order, check the usage from the previous year and anticipate your annual dollar amount appropriately. You must use "US D" as the unit of measure, not "each".

Using the Blanket/Standing Order Form in PantherExpress

- If you are submitting a Standing Order, be specific with the delivery address, quantities and dates for which you are requesting recurring goods or services.

- If the Blanket/Standing Order is a renewal, you must provide the previous PO number. If new, indicate this information.

- If the Blanket/Standing Order is for a service, determine who owns the equipment (Pitt or UPMC). If in doubt, check for the University of Pittsburgh's "asset tag" or contact the Asset Management Department to check the database.
- If the supplier will be on campus for training, installation, maintenance, repairs, etc, a Certificate of Insurance (*http://www.cfo.pitt.edu/risk/insuranceRequirements.html*) is required before service can be rendered and must be attached to the requisition. The University of Pittsburgh must be named as a Certificate Holder and also as an 'additional insured". A correct Certificate of Insurance is required for all maintenance contracts.

The completed Blanket/Standing Order Form becomes part of the requisition. The requisition, after appropriate approvals, becomes a PO and is submitted to the supplier.

Special Instructions for the Blanket/Standing Order Form

When submitting orders greater than $5,000:

- Purchasing Services reviews, approves, and submits the order to the supplier.
- Refer to Requisition Checklist: *http://cfo.pitt.edu/pexpress/documents/reqchecklist.pdf*.

- Do not submit an *incomplete* Directed /Sole Source Justification form *(http://cfo.pitt.edu/pexpress.forms.ph)*. Requester must explain why other suppliers were excluded and proper legible signatures must be included: Dean, Department Chair, or Director. Please indicate title. Requester must sign twice. Print or type names above signatures with title listed.

- If using a Directed or Sole Source Justification Form, the requester or approver must complete the Conflict of Interest forms in HS-Connect before signing the Directed or Sole Source Justification Form.

  Note: Approver must be a Dean, Department Chairperson or Department Director. (Administrators cannot sign on behalf of the Dean, Department Chair or Director).

- Attach all back-up documentation directly to the requisition before submitting for approvals.

Policies Associated with the Blanket Form:

All University of Pittsburgh procurement activities are subject to the University's policies and procedures:

Policy 05-02-02 Conflict of Interest and Procurement Relationships

Policy 05-02-03 Code of Ethics

Policy 05-02-14 Authority for Management of Procurement

Policy 05-02-15 Required Use of Contracted Suppliers

Policy 05-02-16 Competitive Bidding

In order to do business or be considered for doing business with the University, suppliers must comply with these policies which include the University's Terms and Conditions. (See Policy 05-02-18 Supplier Code of Conduct and University of Pittsburgh Schools of Health Sciences Industry Relationship Policy).

Placing Orders Using the Blanket/Standing Order Form

Accessing the form in PantherExpress:

To access the Blanket/Standing Order form:

1. Go to the Home/Shop page.
2. Click on the icon for the Blanket/Standing Order Form.

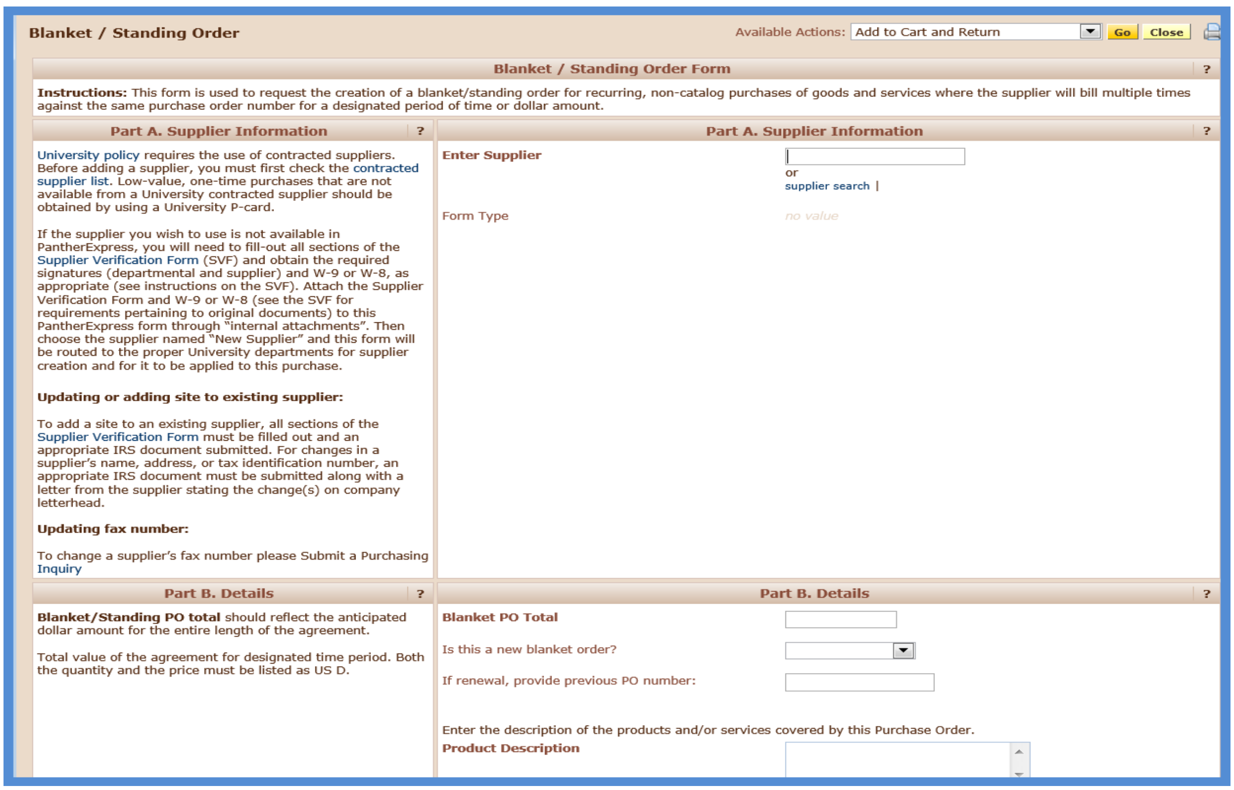
Completing the Blanket/Standing Order Form:

The form is broken into two sections:

- The section on the **right** side of the form contains all of the various fields that may need to be completed while filling out the form.

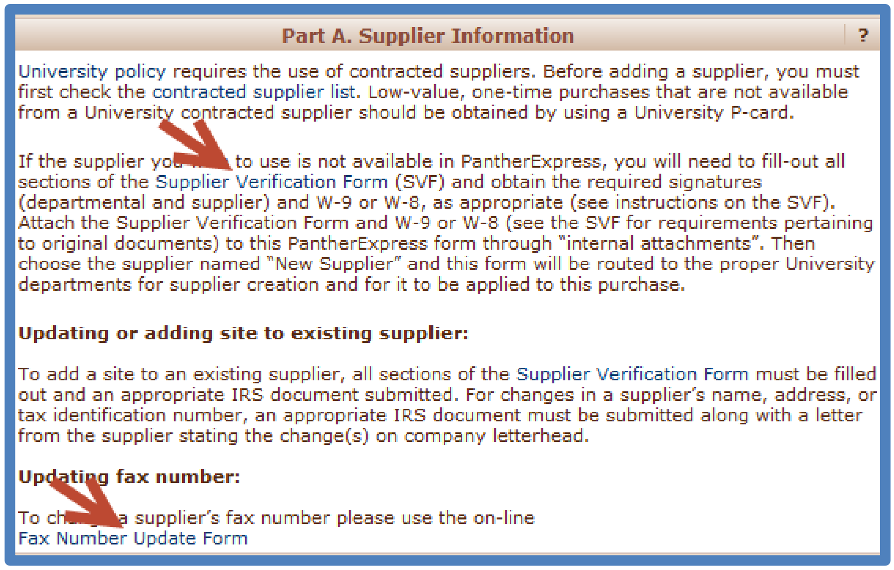
  Note: the Supplier distribution information cannot be left blank. If you do not need to send your order to the supplier, add your own email address as the supplier distribution information into the field.

- The section on the **left** side of the form provides detailed information on how to complete the related fields on the right side of the form. This section is meant to answer most questions you may have related to completing the form.



Placing Orders Using the Blanket/Standing Order Form in PantherExpress

The information on the **left** side of the form also contains hyperlinks. These links will take you to additional information that may be vital to you accurately completing the Blanket/Standing Order Form.



Part A. Supplier Information ?

University policy requires the use of contracted suppliers. Before adding a supplier, you must first check the contracted supplier list. Low-value, one-time purchases that are not available from a University contracted supplier should be obtained by using a University P-card.

If the supplier yo[illegible] to use is not available in PantherExpress, you will need to fill-out all sections of the Supplier Verification Form (SVF) and obtain the required signatures (departmental and supplier) and W-9 or W-8, as appropriate (see instructions on the SVF). Attach the Supplier Verification Form and W-9 or W-8 (see the SVF for requirements pertaining to original documents) to this PantherExpress form through "internal attachments". Then choose the supplier named "New Supplier" and this form will be routed to the proper University departments for supplier creation and for it to be applied to this purchase.

Updating or adding site to existing supplier:

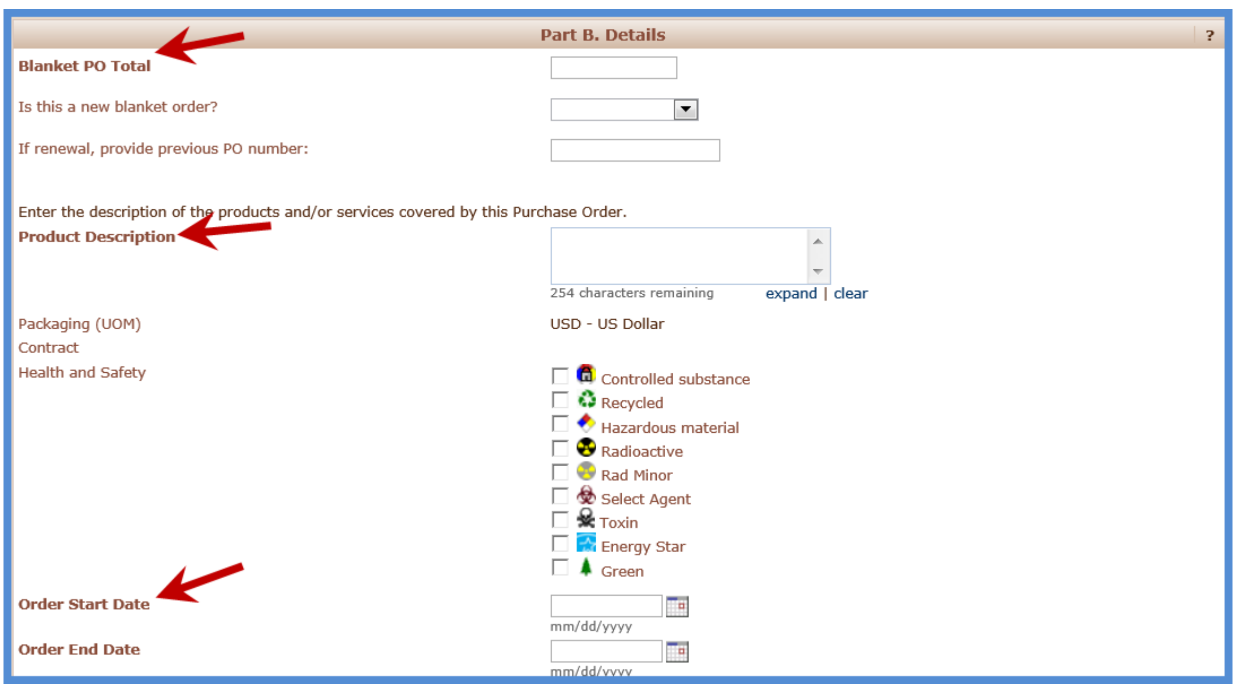
To add a site to an existing supplier, all sections of the Supplier Verification Form must be filled out and an appropriate IRS document submitted. For changes in a supplier's name, address, or tax identification number, an appropriate IRS document must be submitted along with a letter from the supplier stating the change(s) on company letterhead.

Updating fax number:

To ch[illegible] a supplier's fax number please use the on-line Fax Number Update Form

NOTE: All fields on the right hand side of the form that appear to be BOLDED are required.

If one of the required fields is left blank, the system will not allow you to submit the form. You will be required to fill in the missing information before you can submit the form.



Part B. Details ?

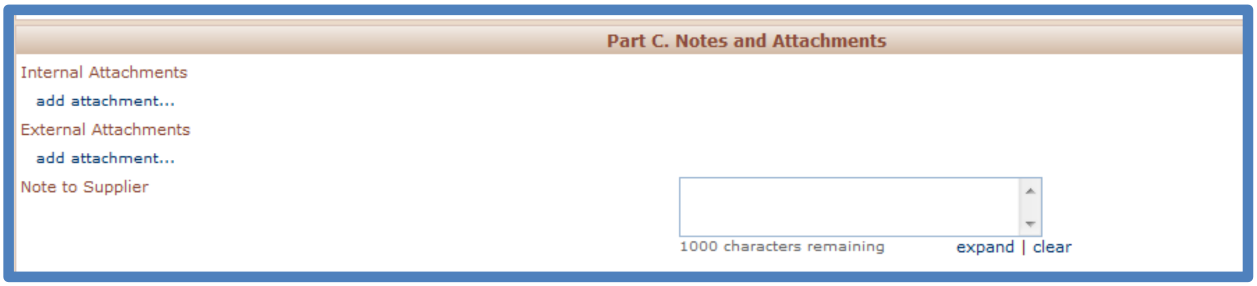
Blanket PO Total	
Is this a new blanket order?	
If renewal, provide previous PO number:	

Enter the description of the products and/or services covered by this Purchase Order.

Product Description	254 characters remaining expand | clear
Packaging (UOM)	USD - US Dollar
Contract	
Health and Safety	Controlled substance Recycled Hazardous material Radioactive Rad Minor Select Agent Toxin Energy Star Green
Order Start Date	mm/dd/yyyy
Order End Date	mm/dd/yyyy

Placing Orders Using the Blanket/Standing Order Form in PantherExpress

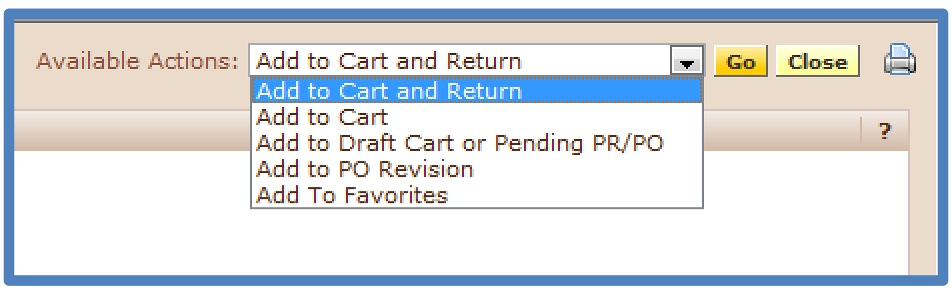
On the form, you will be asked to fill in all of the required fields, and attach all of the required documentation necessary to process your transaction.



Final submission of the form:

- Once you have filled out all of the required information, and attached required documentation, scroll up to the top of the form.

- The Available Actions drop down box will have: "Add to Cart and Return" listed.



- Click on the Go button. This will add your Blanket/Standing Order Form to your cart.

- Then click *Close*.

- To complete your Blanket/Standing Order Transaction – click your shopping cart (located at the top right hand of your screen).

- Complete the transaction.

If you have any questions on completing the form, please call the PantherExpress Customer Service Team at 412-624-3578.

Placing Orders Using the Blanket/Standing Order Form

Creating a Blanket Agreement

Create a blanket agreement for preventative maintenance on film processing equipment for the current fiscal year.

PantherExpress N → Home → Forms → Standard Forms → Blanket/Standing Order Form

1. Complete the Blanket/Standing Order form with the following information:

    a. Supplier — Konica Minolta Business Solutions

    b. Fulfillment Address — Pittsburgh

    c. FAX — Default Fax number

    d. Catalog # — Quote 778562

    e. Product Description — Prev. Maint. for Rolera XR-IR Film Processor

    f. Price — $1,020.00

2. Attach the following as an Internal Attachment.
    - Supplier Quote

3. From Available Action drop-down at the top of the form, choose "Add to Cart and Return" and click Go.
    - The line item is added to your cart
    - The form remains open for your next line item

4. Click *Close.*

5. Review the cart by clicking on the cart summary.

6. Click *Open Form* to modify supplier or line item information.

7. Click *Proceed to Checkout.*

8. Enter the appropriate Accounting Codes.

9. Click *Submit Requisition.*

Using the Software Form

The Software Form is to be used when you are placing a request to purchase non-catalog software-related goods and services.

This form should **not** be used for software purchases that will be made using a P-Card, through a Contracted Supplier, or through CSSD Software Delivery Services.

Note: All University units are required to use contracted suppliers, when available, to purchase goods and services. A listing of these suppliers is provided at: http://cfo.pitt.edu/pexpress/purchases/contractedSuppliers.php

Common Usage:

- Purchase software license maintenance
- Renew existing software licenses
- Renew annual maintenance and support

***Note: You are permitted to use your PCard for Shrink-wrap and Click-wrap software purchases.*

When completing the form:

- Check first to see if the software is available through CSSD Software Delivery Services by checking their web site: http://technology.pitt.edu/software.html.
- If the software is available through CSSD, do not use this form. Contact CSSD via the Help Desk 4-4357.
- Check to see if the software is available through a Contracted Supplier's catalog or punch-out in PantherExpress. If the software is available through a Contracted Supplier, do not use this form. Place the order using the catalog purchase process in PantherExpress.
- Do not submit an order with an expired quote. A current quote from the supplier that is valid for at least thirty (30) days is required. Note: An invoice is **not** a quote.
- Not all suppliers in PantherExpress are *contracted suppliers* – only those who have a punch-out or hosted catalog are *contracted suppliers*.

Check to see if the Supplier is in the Supplier database before starting your order. If the supplier is not in the system, please follow the New Supplier process outlined in this manual.

Using the Software Form in PantherExpress

- Do not use this form when a P-Card is used for the order and payment.
- If this is a purchase for new software; please attach a copy of the Software License Agreement. The Software License Agreement will be reviewed by both Purchasing Services and the Office of General Counsel. If changes are required to the Software License Agreement, Purchasing Services will negotiate those changes with the Supplier.

This form becomes part of the Purchase Order and will be distributed to the supplier.

Special Instructions for the Software Form

When submitting orders greater than $5,000:

- Purchasing Services reviews, approves, and submits the order to the supplier.
- Refer to Requisition Checklist found at:

  http://cfo.pitt.edu/pexpress/documents/reqchecklist.pdf

- Do not submit an *incomplete* Directed /Sole Source Justification form *(http://cfo.pitt.edu/pexpress/forms.ph)*. Requester must explain why other suppliers were excluded and proper legible signatures must be included: Dean, Department Chair, or Director. Please indicate title. Requester must sign twice. Print or type names above signatures with title listed.
- If using a Directed or Sole Source Justification Form, the requester or approver must complete the Conflict of Interest forms in HS-Connect before signing the Directed or Sole Source Justification Form.

  Note: Approver must be a Dean, Department Chairperson, or Department Director. (Administrators cannot sign on behalf of the Dean, Department Chair, or Director).

- If supplier will be on campus for training, installation, repairs, etc, a Certificate of Insurance *(http://www.cfo.pitt.edu/risk/insuranceRequirements.html)* is required before service is rendered and must be attached to the requisition. The University of Pittsburgh must be named as a Certificate Holder and also as an 'additional insured'.

  Attach all back-up documentation directly to the requisition before submitting for approvals.

Policies associated with the Software Form:

Because all software licenses are non-standard (not University) terms they are governed by University of Pittsburgh Policy 05.02.05 as indicated in the left side of the Software Form.

All University of Pittsburgh procurement activities are subject to the University's policies and procedures:

Policy 05-02-02 Conflict of Interest and Procurement Relationships

Policy 05-02-03 Code of Ethics

Policy 05-02-14 Authority for Management of Procurement

Policy 05-02-15 Required Use of Contracted Suppliers

Policy 05-02-16 Competitive Bidding

Special Instructions for the Software Form

In order to do business or be considered for doing business with the University, suppliers must comply with these policies which include the University's Terms and Conditions. (See Policy 05-02-18 Supplier Code of Conduct and University of Pittsburgh Schools of Health Sciences Industry Relationship Policy).

Placing Orders Using the Software Form

Accessing the form in PantherExpress:

To Access the Software form:

1. Go to the Home/Shop page
2. Click on the icon for the Software Form

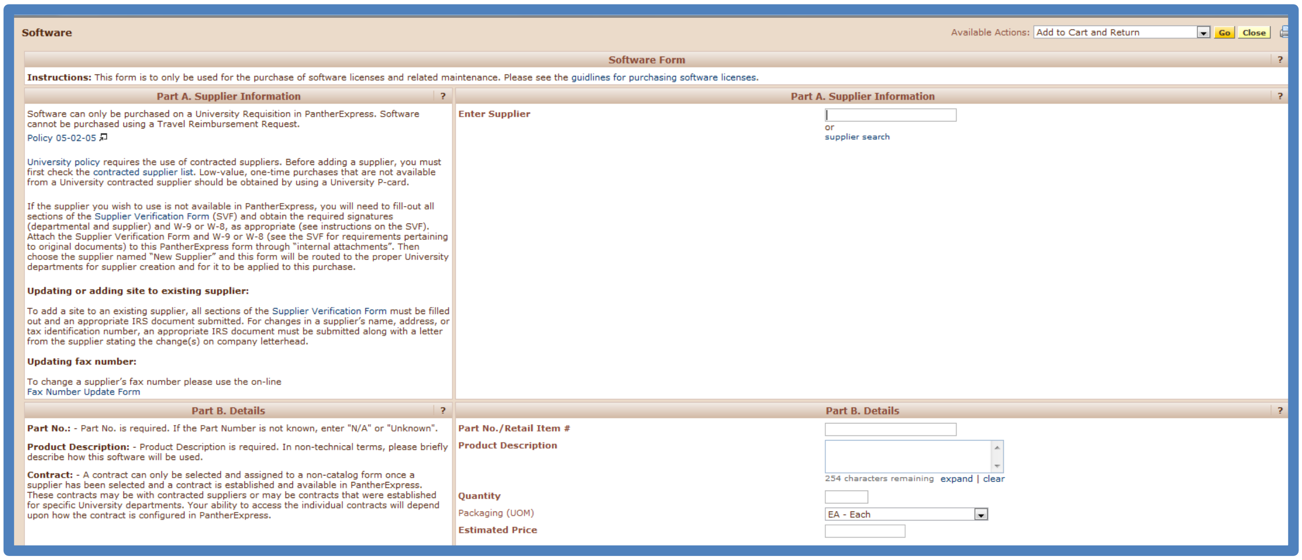
Completing the Software Form:

The form is broken into two sections:

The section on the **right** side of the form contains all of the various fields that may need to be completed while filling out the form.

Note: the Supplier distribution information cannot be left blank. If you do not need to send your order to the supplier, add your own email address as the supplier distribution information into the field.

The section on the **left** side of the form provides detailed information on how to complete the related fields on the right side of the form. This section is meant to answer most questions you may have related to completing the form.



Placing Orders Using the Software Form

The information on the **left** side of the form also contains hyperlinks. These links will take you to additional information that may be vital to you accurately completing the Software Form.

Part A. Supplier Information ?

Software can only be purchased on a University Requisition in PantherExpress. Software cannot be purchased using a Travel Reimbursement Request.

Policy 05-02-05

University policy requires the use of contracted suppliers. Before adding a supplier, you must first check the contracted supplier list. Low-value, one-time purchases that are not available from a University contracted supplier should be obtained by using a University P-card.

If the supplier you wish to use is not available in PantherExpress, you will need to fill-out all sections of the Supplier Verification Form (SVF) and obtain the required signatures (departmental and supplier) and W-9 or W-8, as appropriate (see instructions on the SVF). Attach the Supplier Verification Form and W-9 or W-8 (see the SVF for requirements pertaining to original documents) to this PantherExpress form through "internal attachments". Then choose the supplier named "New Supplier" and this form will be routed to the proper University departments for supplier creation and for it to be applied to this purchase.

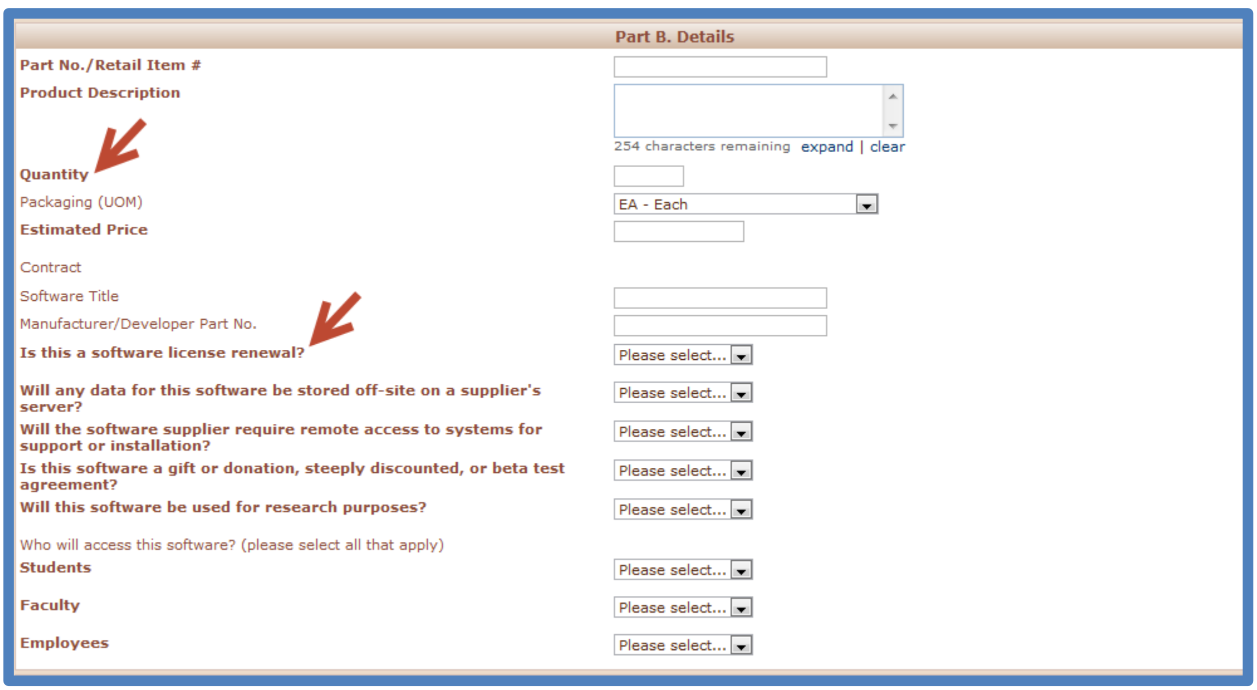
Updating or adding site to existing supplier:

To add a site to an existing supplier, all sections of the Supplier Verification Form must be filled out and an appropriate IRS document submitted. For changes in a supplier's name, address, or tax identification number, an appropriate IRS document must be submitted along with a letter from the supplier stating the change(s) on company letterhead.

Updating fax number:

To change a supplier's fax number please use the on-line Fax Number Update Form

All fields on the **right** hand side of the form that appear to be **BOLDED** are required. If one of the required fields is left blank, the system will not allow you to submit the form. You will be required to fill in the missing information before you can submit the form.



Part B. Details

Part No./Retail Item #

Product Description

254 characters remaining expand | clear

Quantity

Packaging (UOM) — EA - Each

Estimated Price

Contract

Software Title

Manufacturer/Developer Part No.

Is this a software license renewal? — Please select...

Will any data for this software be stored off-site on a supplier's server? — Please select...

Will the software supplier require remote access to systems for support or installation? — Please select...

Is this software a gift or donation, steeply discounted, or beta test agreement? — Please select...

Will this software be used for research purposes? — Please select...

Who will access this software? (please select all that apply)

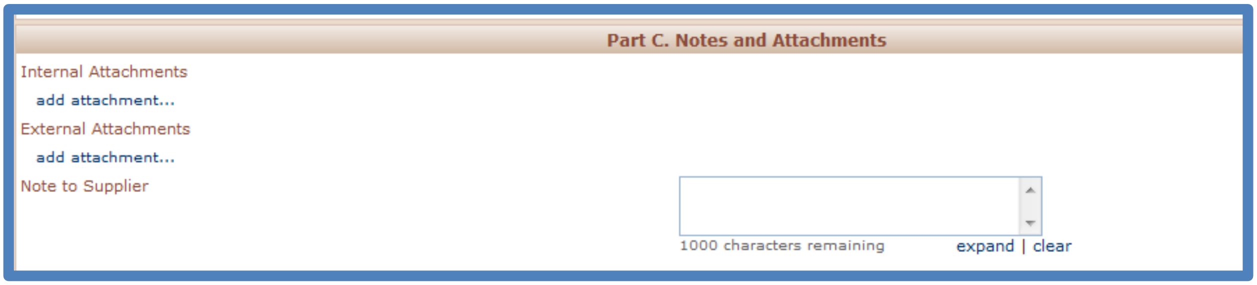
Students — Please select...

Faculty — Please select...

Employees — Please select...

Placing Orders Using the Software Form

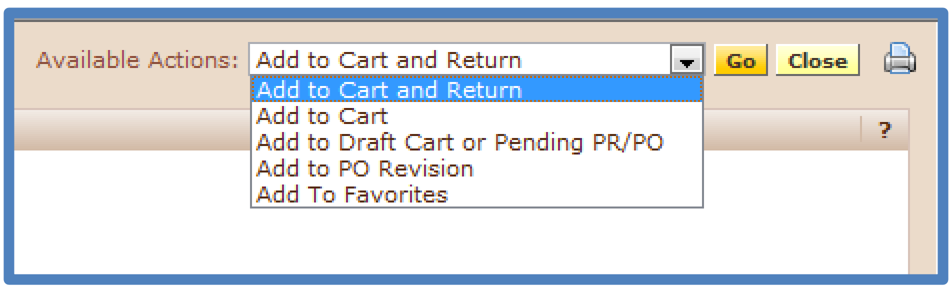
On the form, you will be asked to fill in all of the required fields, and attach all of the required documentation necessary to process your transaction.



Final submission of the form:

1. Once you have filled out all of the required information, and attached required documentation, scroll up to the top of the form.

2. The Available Actions drop down box will have: *Add to Cart and Return* listed.



3. Click on the Go button. This will add your Software Form to your cart.

4. Then click *Close*.

5. To complete your Software Transaction – click your shopping cart (located at the top right hand of your screen).

6. Complete the transaction.

If you have any questions on completing the form, please call the PantherExpress Customer Service Team at 412-624-3578.

Placing Orders Using the Software Form

Purchase Software

Create an order for a software license renewal.

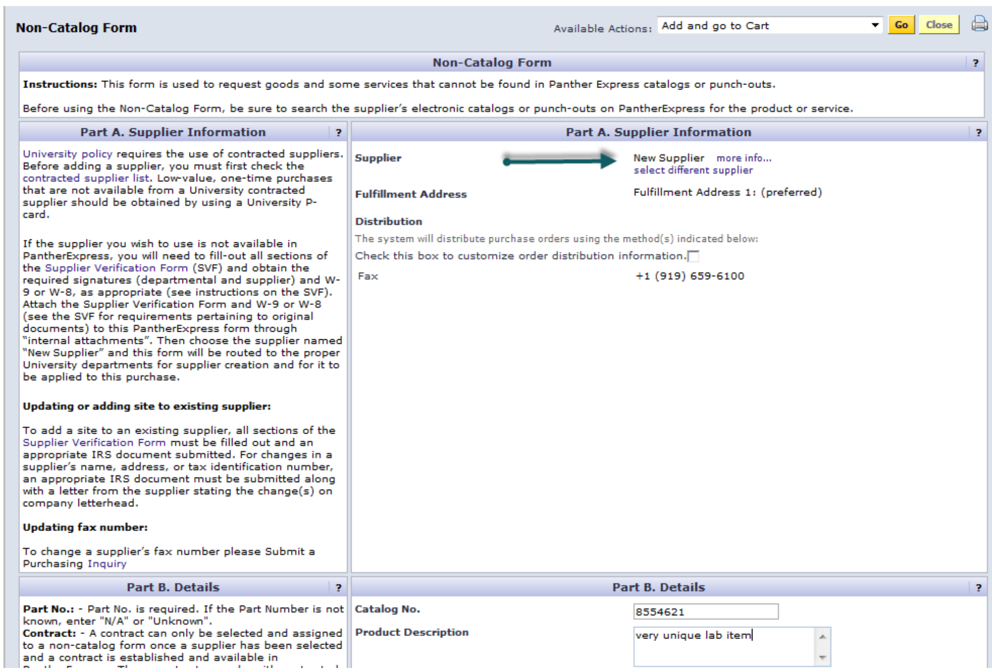
PantherExpress
N → Home → Forms → Standard Forms → Software Form

1. Complete the Software form with the following information:
   - Supplier SysCom Services
   - Fulfillment Address Silver Springs, MD
   - FAX Default Fax number
   - Catalog # license and support renewal
   - Product Description Teleform Desktop license, 1 yr. @ 7800
   - Product Description Teleform Support 1 yr. @1600
2. Answer the series of questions regarding the software use, with either Yes or No.
3. Attach copies of the Sole Source Justification form and Supplier Quote as internal attachments.
4. From the Available Action drop-down at the top of the form, choose "Add to Cart and Return" and click Go.
   a. The line items are added to your cart
5. Click *Close.*
6. Review the cart by clicking on the cart summary.
7. Click *Open Form* to modify supplier or line item information.
8. Click *Proceed to Checkout.*
9. Enter the appropriate Accounting Codes.
10. Click *Submit Requisition.*

Requesting a New Supplier

Purchasing policy states that you should use contracted suppliers where possible. Catalog and Punchout suppliers are all contracted suppliers. For unique buying needs where items are not available from contracted suppliers, and can only be purchased from one particular supplier who is not in the PantherExpress system, you are permitted to request that that supplier be added.

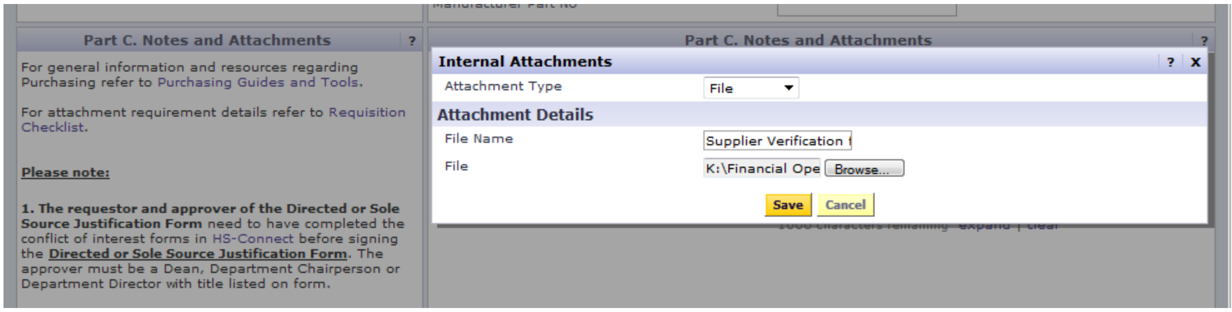
Requesting a New Supplier



1. Complete the Standard Form, entering "New Supplier" in the Supplier field. You cannot enter a Fulfillment Address or Distribution information since the supplier is not yet created in the system.

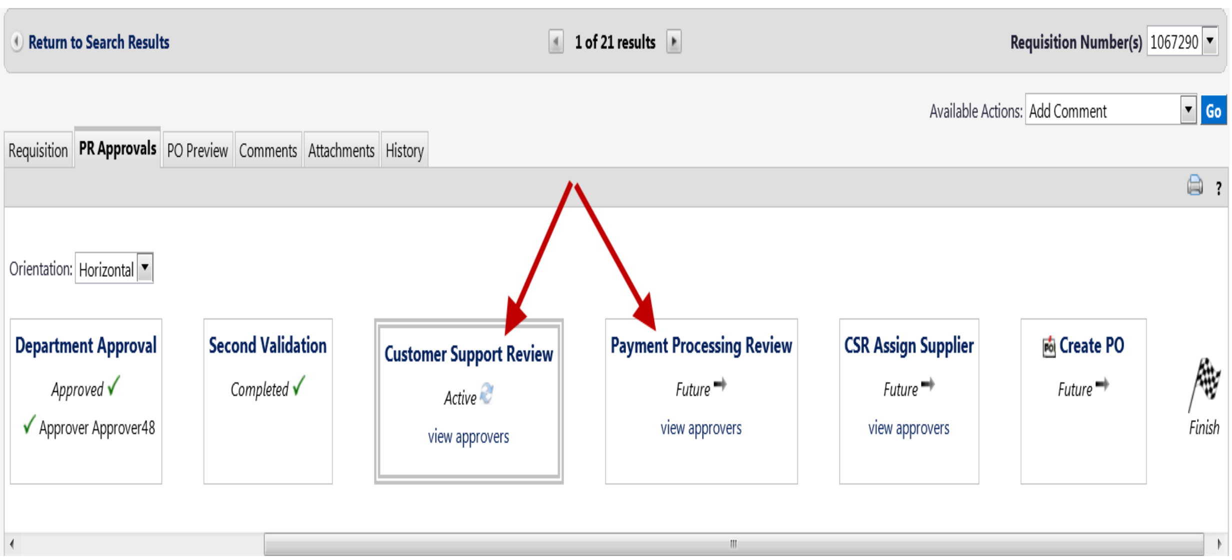
2. Complete the remainder of the Standard Form.

3. Make sure you attach the completed Supplier Verification form as an Internal Attachment.



4. Complete the remainder of the order per usual, and submit for approval.

5. Once the order is approved within your dept., it will automatically route through both PantherExpress Customer Service and Payment Processing for creation of the new supplier, and the completion of supplier information on your order.



6. The order will then transmit to the supplier.

Standard Forms Helpful Hints

- All Standard Forms need to have supplier order transmission information (Distribution Information such as a FAX number or email address).
- The final step to a PO change, on an order created using a Standard Form, is to select Finalize Revision from the Available Actions dropdown menu. The change order will not be completed until it is Finalized.
- The PO change process will trigger the PO workflow, which will send the order for reapproval.

Standard Forms Helpful Hints

What are Invalid Distribution errors?

Invalid Distribution errors refer to an order delivery failure that occurs whenever a purchase order cannot be sent to a supplier from PantherExpress.

- There are three order transmission methods in PantherExpress: (1) automatic electronic distribution for catalog and punchout suppliers, and (2) FAX or (3) Email for all other suppliers. Therefore, a buyer must select FAX or Email when completing one of the Standard Forms.

- Almost all Invalid Distribution errors refer to failed FAX or Email PO delivery attempts on an order created using one of the Standard Forms. There are almost no order delivery issues with the catalog and punchout suppliers.

- If you attempt to have a PO FAXED to a supplier, the PantherExpress system will try 5 times to send the PO to the supplier via the FAX information. If the PO fails 5 FAX attempts, the PO will go into Invalid Distribution, and the Buyer will receive an Invalid Distribution email notification.

- If you attempt to send a PO via Email; the system will try to send the PO to the supplier once before going into Invalid Distribution. The system will only attempt to send an email to a supplier once because, normally, a bad email address will generate an error immediately. The PantherExpress System will receive notification the email address is invalid.

How can I avoid Invalid Distribution errors?

- Verify with the supplier that the FAX number or email address you are attempting to use for PO order delivery is correct.

- When working with a Sales Rep from one of the suppliers, always request the company's main Fax or email address for order delivery/order distribution, since sales reps can change frequently.

- If you find an invalid FAX or email address listed for a supplier in PantherExpress, or if you have a FAX or email distribution fail on an order, contact PantherExpress Customer Service to have the correction made in the system.

What should I do if an Invalid Distribution error occurs?

- The PantherExpress System Solutions group will be contacting you, via the Comments feature in PantherExpress, for correct FAX or Email information for the supplier. They will update your order with the correct information so it will transmit to the supplier.

- The PantherExpress System Solutions group will email you a copy of the Invalid Distribution documentation to help avoid Invalid Distribution errors in the future.