



PantherBuy User Profile Form Instruction



Introduction:

The PantherBuy User Profile Form is a form you must fill out to gain access to the PantherBuy System. All users in PantherBuy will be 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 PantherBuy. When this form is completed, please fax it to the PantherBuy team, 412-624-9339 or mail it to us, 3309 Cathedral of Learning. If you have any questions regarding this form, please email your question to PantherBuy@bc.pitt.edu or check the website, found at www.pantherbuy.bc.pitt.edu.

Roles Explanation:

Shopper – A shopper has the ability to log into the software, search the hosted catalogs, and search the 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), who is normally a Department Buyer, to review the order, attach the appropriate account information and submit the order to the supplier.

Department Buyer – A Department Buyer will have the ability to log into the software, search the hosted catalogs, search 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).

Approver – An Approver is an individual who has been granted permission to review and approve purchase orders submitted in PantherBuy by 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.

Form Instructions:

Shopper- If you are signing up as a shopper in the PantherBuy system you only need to complete fields 1-7 and 11 - 12. 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 PantherBuy system.
2. Enter full name. This is the full name of the person requesting access to PantherBuy.
3. Enter the preferred 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 <http://accounts.pitt.edu/Public/RCAdmin.asp>). This is also the name used to log into PRISM (if applicable).
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.

11. From the Roles list - Select the SHOPPER role.
12. The shopper form needs to have signatures from the shopper and the department administrator or supervisor. The signature of the RC is not required.

Department Buyer and Approver Section - If you will be a Department Buyer and/or an Approver in the PantherBuy 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 PantherBuy system.
2. Enter full name. This is the full name of the person requesting access to PantherBuy.
3. Enter the preferred 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 <http://accounts.pitt.edu/Public/RCAdmin.asp>). This is also the name used to log into PRISM (if applicable).
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. Enter all of the Entity and Department codes that the user will need to access.
9. 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.
10. Indicate the Department Buyer's spending limit: Level 1 is \$0, Level 2 is \$500 and Level 3 is \$5000. Example, a user is permitted to purchase items up to \$500 (Level 2 Department Buyer) without the need for further departmental approval; however, anything over \$500 needs to be approved by a department approver.
11. Select which role(s) this User will have (see "Roles Explanation" above).
12. Please have the person requesting PantherBuy 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 you department, email the PantherBuy team at PantherBuy@bc.pitt.edu. Access will not be granted until all the appropriate signatures are on the form.



User Profile Form

1

Please choose one:

New User

Existing User

Access Termination

Name: _____ 2

Email: _____ 3

Phone: _____ 4

University Computer ID: _____ 5

Department Name: _____ 6

Default Ship-to Location: _____ 7

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 ** 8

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** 8

Attach separate sheet for additional Entities and 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.
			9			

Select the appropriate Spending Limit (Department Buyers Only) **DO NOT LEAVE BLANK**

Level 1 (\$0 Spending Limit)

Level 2 (\$500 Spending Limit) 10

Level 3 (\$5,000 Spending Limit)

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

Shopper

Department Buyer

Approver 11

If you will be the \$5000 OK to Pay designee, please check the Approver box above and have your department administrator list your name on the Department Approval Form.

User's Signature: _____ 12

Date: _____ Phone: _____

Supervisor's Printed Name: _____

Supervisor's Signature: _____

Date: _____ Phone: _____

Authorized RC's Signature: _____

Date: _____ Phone: _____



User Profile Form

Please choose one: New User Existing User Access Termination

Name: _____ Email: _____

Phone: _____ University Computer ID: _____

Department Name: _____

Default Ship-to Location: _____

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.

Select the appropriate Spending Limit
(Department Buyers Only)
DO NOT LEAVE BLANK

- Level 1 (\$0 Spending Limit)
- Level 2 (\$500 Spending Limit)
- Level 3 (\$5,000 Spending Limit)

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

- Shopper
- Department Buyer
- Approver

If you will be the \$5000 OK to Pay designee, please check the Approver box above and have your department administrator list your name on the Department Approval Form.

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

Supervisor's Printed Name: _____

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

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