Welcome to the PantherExpress Specialty Forms Webinar

• Please mute your phone line.

• Please submit all of your questions via the Questions section of the GoTo Meeting control panel. The questions will be answered at the end of the presentation.

• Please use the phone number provided to you in your webinar registration to dial in.
PantherExpress System
Specialty Forms Information Session

PantherExpress Team
What’s Happening?

• The new functionality in the PantherExpress System is being implemented and is called *Specialty Forms*.

• Specialty Forms will enable you to properly contract for services and will also replace the current paper disbursement requests.

• Some of the Specialty Forms are: Professional Service Agreements (PSA), Supplier Provided Agreements, Conference and Events Agreements, Guest Speaker Agreements, and Research Subcontract Agreements.

• Each form has specific information to complete the transaction easily and efficiently.
Project Background:

- Current volume of disbursements on Main Campus is 54,000 totaling $300 million.
- Multiple departments participated in planning meetings and the development of the Specialty Forms solution.
- Pilot groups from six departments began using the functionality in November 2012.
- As of today – we have over 232 Specialty Forms in the system from the pilot departments.
Why Was This Project Undertaken?

- Improved controls: budgetary and regulatory.
- Tracking spend against contracts.
- Speed payment for services contracts.
- Online access to contract information.
Concerns Around the Current Process:

- All paper. Storage costs for paper copies – no easy way to access information related to the transaction – lose original documentation.
- Document sent through inter-office mail.
- Increased risk of over spending on contracts.
## What are the Benefits?

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice information for the transaction is visible in the system.</td>
<td>Any supporting documentation is available on the transaction.</td>
</tr>
<tr>
<td>The new processes will better adhere to existing policies</td>
<td>Ensure compliance with federal and state research requirements.</td>
</tr>
<tr>
<td>History is permanently attached to the transaction.</td>
<td>Approvals are permanently attached to the transaction.</td>
</tr>
<tr>
<td>Contract established prior to making payment in accordance with University policy.</td>
<td>Goods are obtained through purchase orders with the University’s favorable terms and conditions.</td>
</tr>
<tr>
<td>Assigning shopping carts</td>
<td>View transaction approvals in document history.</td>
</tr>
<tr>
<td></td>
<td>Comments and notes will be available in the transaction history of the order.</td>
</tr>
</tbody>
</table>
What will Happen to Paper Disbursements?

• Our goal is to discontinue paper for most disbursements beginning on:

  **July 1, 2014**

• Minor exceptions to be discussed in the Specialty Forms training.

• Any requests to pay for goods through another payment mechanism, aside from P-Card, will be returned.
What Does this Mean to My Department?

- Specialty Forms training will begin in late January 2014.

- The RC business office must be included in the training along with any other departments in that RC. Multiple RCs can be trained at one time.

- We will be contacting the Business Manager to set up the training for each RC and asking them to reserve an appropriate location to hold the training.

- The training will be conducted in a lecture-based format.

- Training must be completed for all RC’s by May 30, 2014.
How are the Approvals Going to Work?

- **Department Approval**
  Anyone currently approving contracts for services or disbursement requests needs to be trained.

- **Second Signature Approval**
  Some form types will automatically route to the appropriate individual in the department for approval. You can also forward approvals – ability to send the document to additional approvers for review.
What Do I Need to Do?

1. Determine who already has PantherExpress System access.
2. Any person in your department who will need access to the Specialty Forms must become a PantherExpress System user.
3. Ensure all users have taken or will take the on-line Purchasing Fundamentals course.
4. Ensure each new user completes an annual Conflict of Interest submission.
5. Once training dates are finalized, Business Managers should notify departmental users of the Specialty Forms training.
What Do I Need to Do? (cont.)

• Determine who will be getting access to the Specialty Forms.

• Determine who will be approving the Specialty Forms transactions.

• Determine who needs to be registered for training.

• Complete new User Profile forms
  • Add the Specialty Forms role.
  • Add the suggested Buyer role – Buyer Level 1.
Date to Remember:

The Business Managers at the RC level should ensure that all of the Department Administrators should complete the survey by:

December 20, 2013

www.surveymonkey.com/s/NeedsAssessment1113
PantherExpress System Links:

User Profile Form Instructions:
  cfo.pitt.edu/pexpress/documents/PEUserProfileFormInstructions.pdf

User Profile Form:
  cfo.pitt.edu/pexpress/pbuyuser.php#pbuyforms

Training Needs Assessment Form:
  www.surveymonkey.com/s/NeedsAssessment1113

Conflict of Interest Form:
  www.hsconnect.pitt.edu/HSC/authc/login.do?app=iCOI&page=login

Purchasing Fundamentals Online Course:
  cfo.pitt.edu/pexpress/training/purchFund.php

Training Materials:
  cfo.pitt.edu/pExpress/SpecialtyFormsTraining.php
Questions?

PantherExpress Customer Service Team:
Phone: 412-624-3278
or submit an online inquiry at:
cfo.pitt.edu/pexpress/CustomerService/purchasing/pantherbuy.php