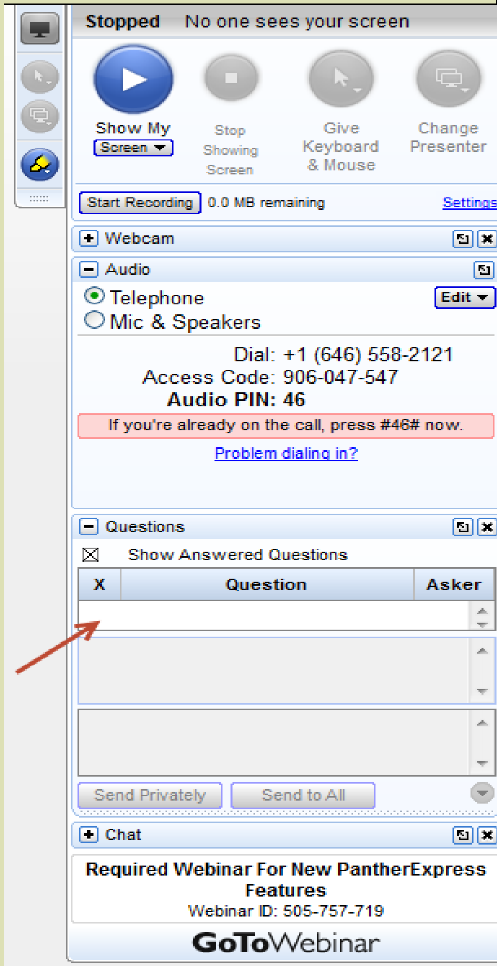
University of Pittsburgh

PANTHEREXPRESS | BUYING & PAYING

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?

• Invoice information for the transaction is visible in the system.	• Any supporting documentation is available on the transaction.
• The new processes will better adhere to existing policies	• Ensure compliance with federal and state research requirements.
• History is permanently attached to the transaction.	• Approvals are permanently attached to the transaction.
• Contract established prior to making payment in accordance with University policy.	• Goods are obtained through purchase orders with the University's favorable terms and conditions.
• Assigning shopping carts	• View transaction approvals in document history.
• Comments and notes will be available in the transaction history of the order.	

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?

- Determine who already has PantherExpress System access.
- Any person in your department who will need access to the Specialty Forms must become a PantherExpress System user.
- Ensure all users have taken or will take the on-line Purchasing Fundamentals course.
- Ensure each new user completes an annual Conflict of Interest submission.
- 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