**Introduction:**
The PantherBuy User Profile Form must be filled out to obtain access to the PantherBuy System. All users in PantherBuy 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 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 contact customer service [HERE](mailto:cathy@bc.pitt.edu) or check our website, found at [www.pantherbuy.bc.pitt.edu](http://www.pantherbuy.bc.pitt.edu).

You must also fill out a Conflict of Interest form found at [http://ww1.bc.pitt.edu/forms/arCoic.pdf](http://ww1.bc.pitt.edu/forms/arCoic.pdf).

**User Training Requirements:**
All those registering as an Approver or Buyer must attend PantherBuy training, and are required to complete Purchasing Fundamentals. Purchasing Fundamentals training is offered several times per year as a live presentation through the [Faculty and Staff Development Program for University Business and Financial Services](http://www.pitt.edu/business/). The course is now also offered online and you are able to take it at your convenience. For the online version of Purchasing Fundamentals training email Cathy Lewis at cathylewis@bc.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: [www.pantherbuy.bc.pitt.edu](http://www.pantherbuy.bc.pitt.edu). User credentials are not provided until completion of required training.

**Policy:**
It is Policy, that if a PantherBuy 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 PantherBuy. This is due to upgrades occurring in the system, and the changes being made to the various screens and software functions.

**Roles Explanation:**
**Shopper** – A shopper has the ability to log into PantherBuy, 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.

**Department Buyer** – A Department Buyer will have the ability to log into PantherBuy, 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).

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

**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 - 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](http://www.pantherbuy.bc.pitt.edu/forms/).

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 my.pitt.edu.

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. (Note: Do NOT need to indicate a Spending Limit in section 12)

13. 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 are registering to 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 my.pitt.edu.

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. Indicate the Completion Date for the Purchasing Fundamentals training.

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

10. 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.

11. Select which role(s) this User will have (see “Roles Explanation” above). (Note: Department Buyers must indicate a Spending Limit in Section 12). A Departmental Approval Form should be completed when adding a new approver.

12. Indicate the Users role and 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.

13. 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 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.

Last update June 15, 2011
User Profile Form

Please choose one: □ New User □ Existing User □ Access Termination

Name: __________________________________________

Phone: ___________________________

Department Name: ______________________________________________________________

Default Ship-to Location: __________________________________________________________

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

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 Entities and 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

□ Department Buyer

□ Approver

Select the appropriate Spending Limit (Department Buyers ONLY)

□ Level 1 ($0 Spending Limit)

□ Level 2 ($500 Spending Limit)

□ Level 3 ($5,000 Spending Limit)

If you will be the $5000 OK to Pay designee or the Account Assigner, 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: __________
User Profile Form

Please choose one:  [ ] New User  [ ] Existing User  [ ] Access Termination

Name: ____________________________________  Email: ____________________________________

Phone: __________________________  University Computer ID: ________________

Department Name: ________________________________________________________________

Default Ship-to Location: _____________________________________________________________

Purchasing Fundamentals Completion Date: ____________  Conflict of Interest Form completed: [ ]

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

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

What ROLE(S) will this person have?  [ ] Shopper ONLY  [ ] Department Buyer  [ ] Approver

Select the appropriate Spending Limit (Department Buyers ONLY)

[ ] Level 1 ($0 Spending Limit)
[ ] Level 2 ($500 Spending Limit)
[ ] Level 3 ($5,000 Spending Limit)

If you will be the $5000 OK to Pay designee or the Account Assigner, 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: ________________________________

User’s Signature: ___________________________________________  Date: ___________  Phone: ___________

Authorized RC’s Signature: ____________________________________  Date: ___________  Phone: ___________

Last update June 15, 2011