CLARK ATLANTA UNIVERSITY – PANTHERBUY (powered by Jaggaer)
FREQUENTLY ASKED QUESTIONS

1. **What is PantherBuy?** PantherBuy is Clark Atlanta University's online catalog and ordering e-procurement system, powered by Jaggaer.

2. **If I need additional information regarding PantherBuy, whom do I contact?** Please contact a member of the Procurement staff directly at 404-880-8411; 404-880-6014; 404-880-6875 or submit your questions or comments to purchasing@cau.edu.

3. **As a University employee, how do I gain access to PantherBuy?** To gain access to PantherBuy, potential users must attend a two-hour training course to learn how to navigate and use the system. The PantherBuy training sessions are intended for members to learn the functionality of PantherBuy. The training schedules will be published and available on the PantherBuy webpage.

4. **What are the required forms that need to be completed in order to gain access to PantherBuy?** The required forms are the Banner User Account Application and Finance Purchasing Procurement forms. Once completed, the employee's manager needs to provide signature approval for authorization. Specific roles and permissions will be assigned based on the users' Banner Finance security.

5. **What does it mean when I try to utilize PantherBuy and I receive an error message that says…"unauthorized"?** What should I do? The user has not been granted access to a specific fund, organization or specific action within the PantherBuy system. Work with your manager to complete the required documentation to gain access.

PLACING ORDERS:

6. **How do I place an order in PantherBuy?** We recommend that you register for PantherBuy Training.   The training schedules and PantherBuy user guides and tutorials are available on the PantherBuy shopping home page.

7. **How do I search for a vendor in PantherBuy?** Vendors are categorized by either a Punch-out vendor (located in the showcase) or as a Non-Catalog vendor.

- Punch-out vendors are located on dashboard under "Showcases".
- Non-Catalog vendors are located on dashboard under "Shop". Click on "Non-Catalog item" then enter the vendor's name to begin search.

8. **What do I do if I cannot find my vendor?** Please contact CAU Purchasing Department at **Purchasing@cau.edu.**

9. **How do I update a vendor's address?** All vendors are required to complete a vendor application to update existing vendors in PantherBuy. The vendor application is located on the CAU PantherBuy website under forms. All completed vendor applications must be uploaded into PantherBuy, via the "New Vendor Request Form" option. Purchasing will not accept any vendor changes, via email.

10. **How soon will my vendor appear in PantherBuy?** The standard vendor set-up processing time is 24-48 hours from the time the document is submitted to Purchasing. Please allow this processing period before inquiring about the status of your vendor. Vendor documents are approved when all vetting requirements are satisfied.

11. **What is a document search?** A document search provides the ability within PantherBuy to search requisitions, purchase orders, and invoices across dates relative to the current date (e.g., yesterday, or last month).

12. **As a University employee, how do I receipt items?** Ordering departments are required to forward all packing slips to Central Receiving when receiving goods, via desk top delivery. Please forward receipts within 24 hours of receiving the order.

13. **How do I find out who an order has been assigned to and who the Approver is?** Locate the requisition in PantherBuy, click on the PO Approvals tab. You will see the workflow and the Approvers. Use the "View Approvers" link to identify the next person in the workflow. You may use the "Add Comment" feature to send any Approver a message.

14. **How do I increase the dollar amount of a particular line item?** Once the PO has been created, submit a Change Request Form (located under the Forms tab in PantherBuy) to purchasing@cau.edu, requesting to increase the line item and the amount.

15. **Once the PO has been submitted, how can I get a copy?** Navigate to the purchase order in PantherBuy. On the right hand side of the PO there is a "Print Preview Status button", click on print button.

16. **May users edit a requisition after it goes through the approvals path?** No, a requisition may not be changed after it has gone through the approval workflow. Please contact the Purchasing Agent or Assistant with any questions.

17. **What should I do if my requisition is returned for insufficient funds?** If your requisition is returned for insufficient funds, check the budget line to verify if the

budget is available in that specific account code. If not, please submit a budget revision to your respective Budget Analyst for further processing.

18. **What is the bid threshold?** The dollar amounts are $5,000 - $100,000 – Small Purchase method for competitive procedures are required, including price or rate quotations from a minimum of 3 qualified sources.

    $100,000 and above – Competitive sealed bid solicited from the widest practical selection of qualified sources. All documentation of competitive bidding must be attached to the requisition, including copies of the bids not selected and any documentation of a sole source provider. Contact Purchasing for more details or refer to the Purchasing Policy. Proposed transactions equal to or greater than $300,000 will require the approval from the Board of Trustees.

19. **How do I charge multiple accounts on a requisition?** If you need to split an order, you can do so at the header level. Charges are split by percentage or price – this means that all lines will inherit the header accounting codes. If you need to make changes at the line level, please navigate to the Accounting Codes tab and select the "Edit" button and make your changes at the line. The easiest process would be to put in a separate line for each account (if you are not buying from punch-out catalog items).

20. **How do I delete a requisition from PantherBuy?** Requisitions cannot be deleted. You can withdraw a requisition as long as it is still in the approval workflow process. Navigate to your requisition and on the right hand side under Document Actions select "Withdraw Entire Requisition". This puts the requisition back into your draft cart. You can choose draft carts from the menu and then delete that cart.

21. **Once a requisition has been submitted in PantherBuy, how do I add an attachment without withdrawing the requisition?** Access the Comments tab in the requisition. Click on the "Add Comment button". At the bottom of the window that appears, there is a browse area to attach a file or link to the requisition.

22. **Why has my requisition been returned by the system?** If you have insufficient budget funds, your requisition will not process any further. In addition, if you have two different vendors in the same shopping cart, the requisition will split into two different PO's. This scenario can accidentally happen if your cart is not empty when you shop**.**

23. **What should I do if I am charged sales tax?** Contact the vendor to notify them that Clark Atlanta University is tax exempt and provide the vendor with the proper Tax Exemption Certificate.

24. **If I need a wire transfer done, do I still enter the information in PantherBuy to get a Purchase Order? Who initiates the wire transfers and how will they be notified?** Yes, a Purchase Order needs to be generated and the wiring documentation should be attached as part of documentation. The Budget office initiates the wire transfers. Once

the wire has been processed and approved, Accounts Payable will process the paperwork as a manual payment and close the Purchase Order.

25. **How can I follow the process of my order?** From the welcome page of PantherBuy, use the search box in the upper right corner Select -PR No. from drop-down box – enter requisition # - click GO click on PR Approvals tab - will display the step the order is currently in.

26. **Where do I find out who is the next approver in the step?** Click the PR Approvals tab on the requisition and click the "view approvers" to show the list of next approver in each role.

27. **I am an approver. Where do I go to review/approve an order?** Click on PantherBuy approvers on the dash board, approvals on the tool bar, assign the order to your PR approvals folder, review the requisition and complete action, click go.

28. **How do I change roles?** Clicking on the logout tab from the main page of PantherBuy will take you to the dashboard where you can easily switch your roles.

29. **Once I change roles how do I approve the requisition?** Click on the Approvals tab on the tool bar Click -Assign the requisition from My PR Approvals folder – click on requisition number. If order is correct – Complete Action – click GO

ACCOUNTS PAYABLE PROCESSING:

30. **I have an invoice for my PO, how do I get it paid?** Scan the invoice and email it to Accountspayable@cau.edu.

31. **Where should vendors mail invoices and/ or can invoices be sent to Accounts Payable electronically?** To ensure prompt payment of invoices, invoices should be sent directly to Accounts Payable:

>   Clark Atlanta University
>   Attn: Accounts Payable
>   223 James P Brawley Drive, SW
>   Atlanta, GA 30314

Single invoices can be scanned and sent as an email attachment to Accountspayable@cau.edu. All invoices must reference a nine digit PO number.

32. **When will my check be issued?** Checks are cut every Tuesday and Thursday of the month.

33. **What is the difference between an invoice and a pro forma invoice?** An invoice is the official documentation from a supplier requesting payments for goods or services rendered. A pro forma invoice is a price quote and subject to change. Accounts Payable does not pay from pro forma invoices, statements, quotes or estimates.

34. **What is required to process payments for consultants, stipends and awards**? The required documentation needed for consultant payments are: An Invoice and the Consultant Agreement. The invoice needs the "Ok to pay" and signature from the representative that can verify the services were completed and payment is due. The required documentation needed for stipend payments are: Requisition with the amount and documentation from the grant that states the stipend amount to be paid and that it is allowed by the grant. This does not include travel requests.

35. **What supporting documentation is required for food request invoices?**

   - The invoice from the vendor
   - Meeting agenda
   - A list of those in attendance

36. **When is a Payment Request Form required?** A payment request form is required for the following:
   - An invoice with an invoice number is not part of the supporting documentation; or
   - An invoice does not have an invoice number

   When submitting an invoice with an invoice number to A/P, please ensure the following is present. This information cannot obstruct any information on the invoice. Please place the information in a blank area on the invoice as the invoice must remain legible.
   - Approval is given by writing on the invoice "ok to pay";
   - The approval is signed and dated. The approver should print his/ her name after the approval signature;
   - The approver should identify his/ her title;
   - Provide general ledger coding/ accounting string to which the expense should be charged. If the invoice is PO related, please identify the PO number. For blanket PO numbers, a release number with the PO number is required.
   - NOTE: Accounts Payable does not change the FOAP (Fund-Org-Acct-Program) code when a PO is referenced.

37. **What do I do if I do not see my "Ship To" address?** Please contact CAU Purchasing Department at Purchasing@cau.edu. The end users should not attempt to add the "Ship To" address.