

Panther Mart Shopper Training Guide

Shopper Guide

Panther Mart Training Manual

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Chapter 1

Introduction to Panther Mart and Contact Information

Panther Mart is Georgia State University's new online catalog and ordering e-procurement program. This program will allow users to easily comparison shop online for contract items from state and institution suppliers, create electronic requisitions, and submit these requisitions for approval and create receipts for goods.

This is made available by seamlessly integrating SciQuest's or Higher Markets catalog and invoicing functionality with our PeopleSoft Purchasing module. This user friendly application allows for quick and easy order placement, improved expense management and greater flexibility for purchases at year end.

Benefits of Panther Mart:

- Online browsing and shopping for items
- Comparison shopping
- Greater Flexibility for yearend purchases
- Improved expense management

Contact Information for Panther Mart:

- Purchasing Office: (404) 413-3150
- Accounts Payable (404) 413-3040
- Spectrum Office: (404) 413-3034

Roles and Overview of the Panther Mart Process

Roles for Panther Mart

- **Shoppers:** Shoppers select items for purchase and send it to a Requestor to enter payment information. All employees can shop in Panther Mart.
- **Requestors:** Requestors enter payment and workflow information, and then submits the cart for processing.
- **Approver:** Approvers are notified about all purchases for their department or project. Approval will be required for some purchases (for more information please see rules on page). In some cases the Requestor will also be the first approver.

General Panther Mart Process

Step 1. The Shopper or Requestor selects items for purchase and places them into shopping cart.

Step 2. The Requestor enters the chart field information and submits the purchase into workflow for approval. The shopping cart changes to a Purchase Requisition once submitted for processing.



Step 3. The system automatically completes a budget validation to determine if the chart field information is valid and if there is enough money for the purchase. The system will **not** encumber the funds at this point. If the purchase requisition does not pass budget validation it will be returned to the Requestor. The requestor will be notified by email if the purchase is returned.

Step 4. If the purchase requisition passes budget check, it will notify the department or project approvers. Some purchases will also need approval from the approvers and purchasing. For more information about rules please see page 4.

Step 5. Once the purchase requisition has completed the necessary workflow, the system automatically completes another budget validation. If funds are available in the budget, the requisition is turned into a purchase order. The purchase order is sent to the supplier and a background process sends the purchase order into PeopleSoft Financials. The purchase order is budget checked in Financials and funds are encumbered.

Step 6. When the items are received in the department, generally the requestor will receive the goods in Panther Mart. In order for a supplier to be paid, the items must be marked as received in Panther Mart.

Supplier Type: There are three supplier types in Panther Mart

1. **Statewide Contract:** Suppliers have been awarded a contract for specific items from the State of Georgia. The Statewide Contract suppliers will have a  symbol.
2. **Agency Contract:** Suppliers have been awarded contract for specific items from the Board of Regents or Georgia State University. The Agency suppliers will have a  symbol.
3. **Open Market Supplier:** Any supplier that does not have a Statewide or Agency Contract.

Panther Mart Workflow Routing Rules

A. All Purchases on Contract with total under \$3,000.00

- Department/Project Approvers notified
- No approvals needed

B. All Purchases from Open Market with total under \$3,000.00

- Department/ Project Approvers will approve
- No other approvals needed

C. Purchases between \$3,000.00-\$24,999.99 (no single item greater than \$2,999.99)

- Department/ Project Approvers will approve
- No other approvals needed

D. Purchases between \$3,000.00-\$24,999.99 (at least one item greater than \$2,999.99)

- Department/Project Approvers will approve
- Purchasing will approve
- Central Receiving will be notified to tag item

E. Purchases over \$24,999.99 (no single item greater than \$2,999.99)

- Department/Project Approvers will approve
- Purchasing will approve (**on Open Market purchases only**)

F. Purchases over \$24,999.99 (at least one item greater than \$2,999.99)

- Department/Project Approvers will approve
- Purchasing will approve
- Central Receiving will be notified to tag item

G. IT and Software related Purchases over \$24,999.99

- Department/Project Approvers will approve
- Purchasing will approve
- Central Receiving will be notified to tag item if necessary
- ITPR form must be completed

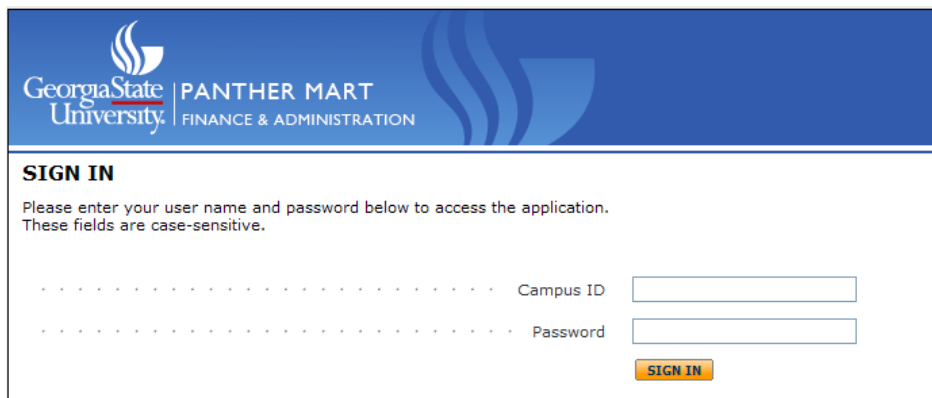
1. There are 2 Approvers for Department workflow and 3 approvers for Project workflow. When a cart has both department and project speed chart use Project workflow so PI can approve.
2. URSA will be notified of certain chemical purchases. All rules listed above apply to this purchase.

Chapter 2

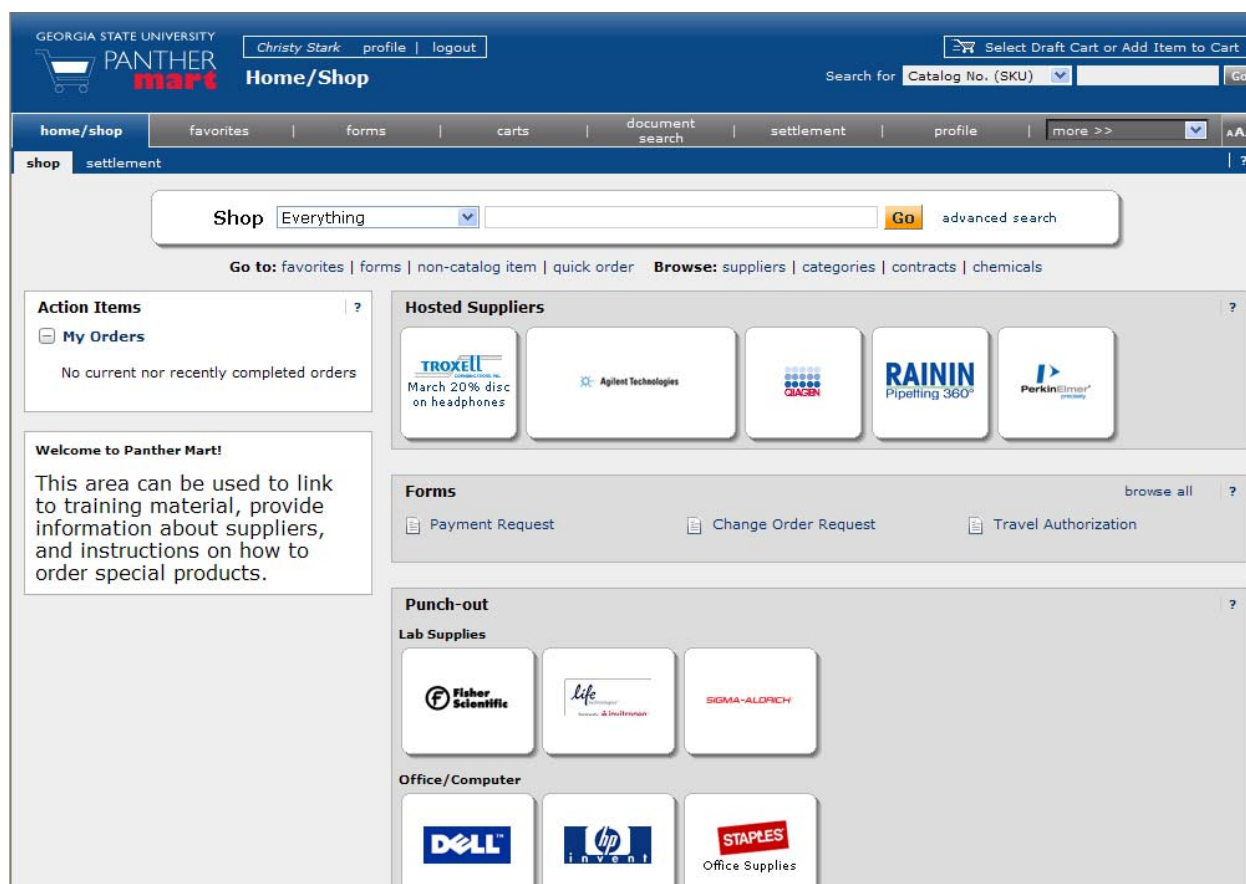
Accessing Panther Mart

Step 1: In the web browser type: www.panthermart.gsu.edu

Step 2: To log in enter Campus ID and Password and select Sign In. **Note: Campus ID will be all Capital Letters.**



The image shows the 'SIGN IN' page of the Panther Mart application. At the top, there is a blue header with the Georgia State University logo and the text 'PANTHER MART FINANCE & ADMINISTRATION'. Below the header, the 'SIGN IN' section contains a message: 'Please enter your user name and password below to access the application. These fields are case-sensitive.' There are two input fields: 'Campus ID' and 'Password', each preceded by a series of dots indicating the character count. Below the password field is an orange 'SIGN IN' button.



The image shows the 'Home/Shop' page of the Panther Mart application. The top navigation bar includes the Georgia State University logo, the 'PANTHER mart' logo, and a user profile section for 'Christy Stark' with links for 'profile' and 'logout'. A search bar is located on the right with a dropdown menu set to 'Catalog No. (SKU)' and a 'Go' button. Below the navigation bar, there is a 'Shop' section with a dropdown menu set to 'Everything' and a 'Go' button. A 'Go to:' section lists various categories: favorites, forms, non-catalog item, quick order, Browse: suppliers, categories, contracts, and chemicals. The 'Action Items' section shows 'My Orders' with a message: 'No current nor recently completed orders'. The 'Hosted Suppliers' section displays logos for TROXELL, Agilent Technologies, QIAGEN, RAININ, and PerkinElmer. The 'Forms' section lists 'Payment Request', 'Change Order Request', and 'Travel Authorization'. The 'Punch-out' section is divided into 'Lab Supplies' (Fisher Scientific, life, SIGMA-ALDRICH) and 'Office/Computer' (DELL, hp, STAPLES).

Chapter 3

Shopping for Items in Panther Mart

In Panther Mart there are three ways to purchase items. Items can be purchased using a Hosted Catalog, Punch-out Catalog or Non Catalog.

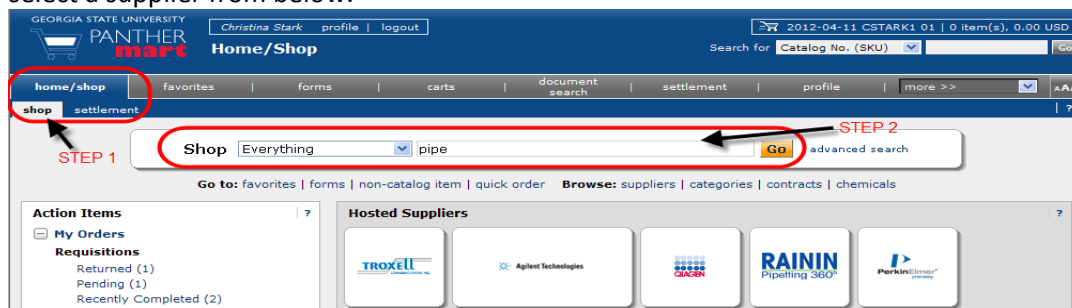
- **Hosted Catalog** contains items and prices stored directly in Panther Mart.
- **Punch-Out Catalog** directs a shopper to a supplier's website set up for Georgia State University to shop for items. Once the items are selected from the supplier's website they will be placed in the shopper's cart in Panther Mart. Many of the punch-out suppliers market products that have optional or configurable requirements.
- **Non Catalog** page can be used to purchase items that are not found in a hosted or punch out catalog. Items can be from a Statewide Contract, Agency Contract or an Open Market Supplier.

I. Hosted Catalog Shopping:

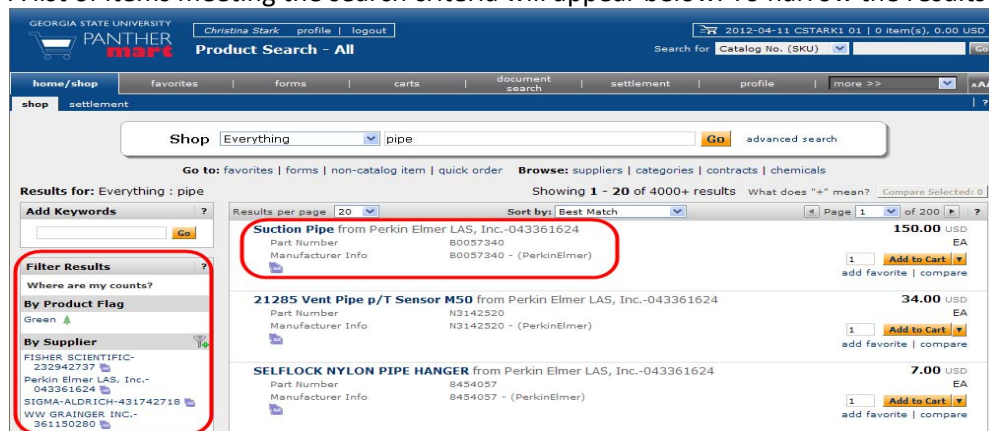
Step 1: Select the Home / Shop tab in the top left corner of the page. Then select the Shop tab below.

Step 2: Enter a brief description in the search field and select Go.

Note: To narrow the results select a drop down category next to the search field, use the advanced search button or select a supplier from below.



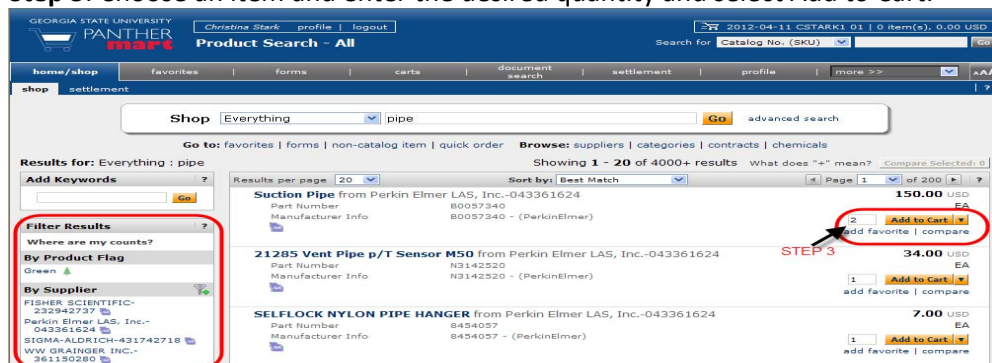
A list of items meeting the search criteria will appear below. To narrow the results select a filter on the left panel.



Optional: To find out more information about the product select the item name. A new window will appear with product information and a drop down to add to cart or add to favorites for easy selection later.

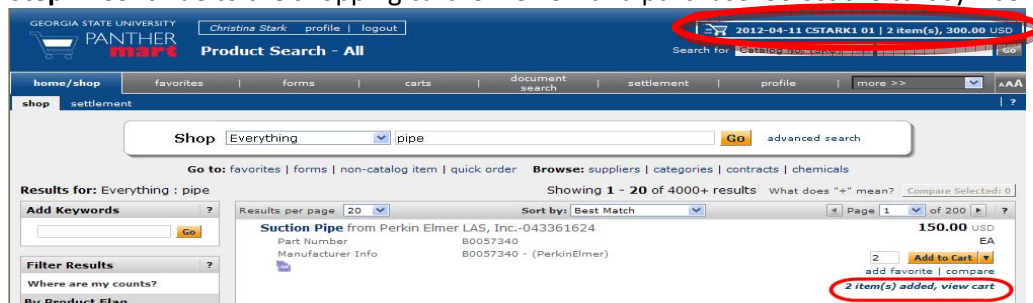
Suction Pipe			
Supplier	Perkin Elmer LAS, Inc.-043361624	Preferred location	000001 change preference show all locations
Part Number	B0057340	Price	150.00 USD
Manufacturer Name	PerkinElmer	Quantity	1
Manufacturer Part Number	B0057340	<input type="button" value="Add To Active Cart"/> <input type="button" value="Go"/>	
System Packaging	EA		

Step 3: Choose an item and enter the desired quantity and select Add to Cart.

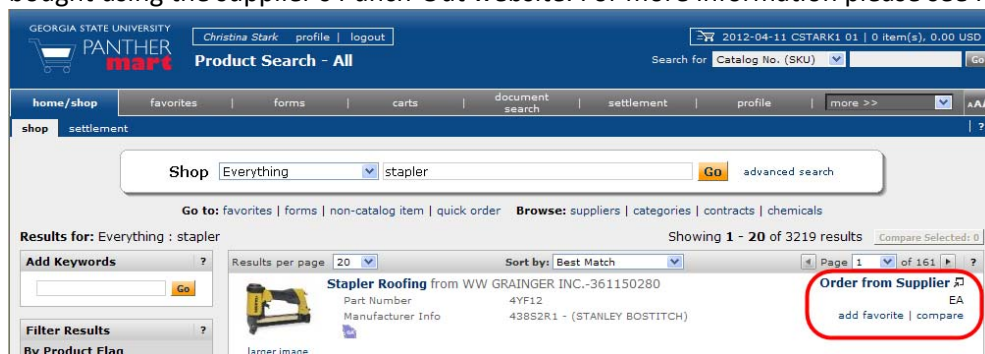


When an item is placed in the cart, it will be noted below the item and at the top right of the screen (see picture below). To continue shopping enter another description in the Search field or select the Home/Shop tab to select a supplier.

Step 4: Continue to the shopping cart for review and purchase. Select the cart symbol at the top right of the screen.



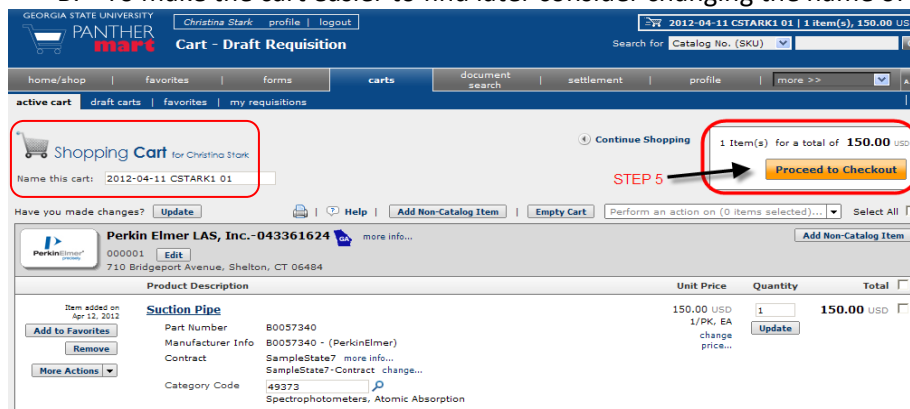
Note: If the item has "Order From Supplier" listed instead of a price (as shown in the picture below) the item can be bought using the supplier's Punch-Out website. For more information please see Punch-Out Shopping on page 8.



Step 5: Review the items listed in the shopping cart, make any needed updates and then **Select Proceed to Checkout.**

A. To make updates to the quantity, enter the desired quantity and select update.

B. To make the cart easier to find later consider changing the name of the cart.



Next: Assigning a cart to a Requestor for reviewing the purchase. Please continue on page 13.

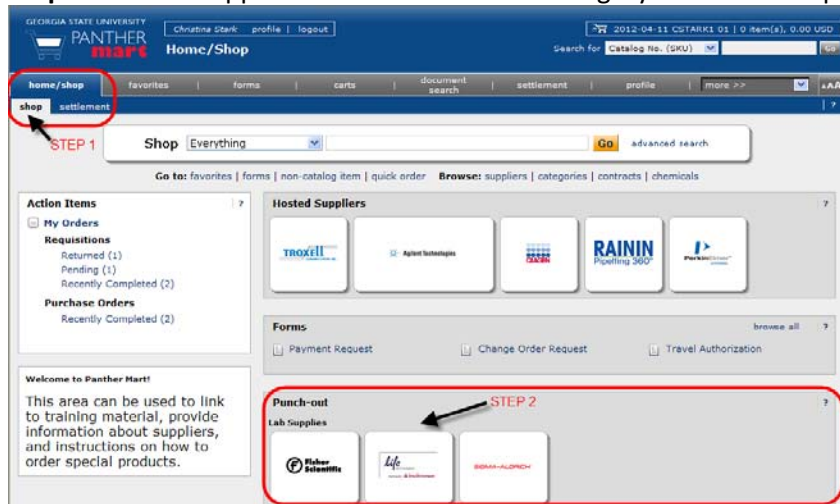
II. Punch-Out Catalog Shopping:

A Punch-Out catalog directs shoppers to a supplier's website. Many of the Punch-Out suppliers market products that have optional or configurable requirements. There are two ways to get to a Supplier's punch-out catalog. The first way is to go directly to the supplier's website by selecting the Supplier's icon on the Home/Shop page. The second way is to search for an item and select one that lists "Order from Supplier" instead of a price. Both ways will be discussed below.

A. Direct link to the supplier's website

Step 1: Select the Home / Shop tab in the top left corner of the page.

Step 2: Select a supplier from the Punch-Out category list. This will open the supplier's website.



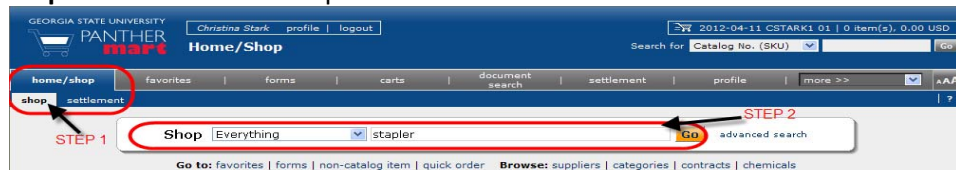
Continue to section C: Punch-Out Supplier Website below.

B. Link to supplier's website from item search

Note: Not all Punch-Out suppliers will list their items on the Hosted Catalog.

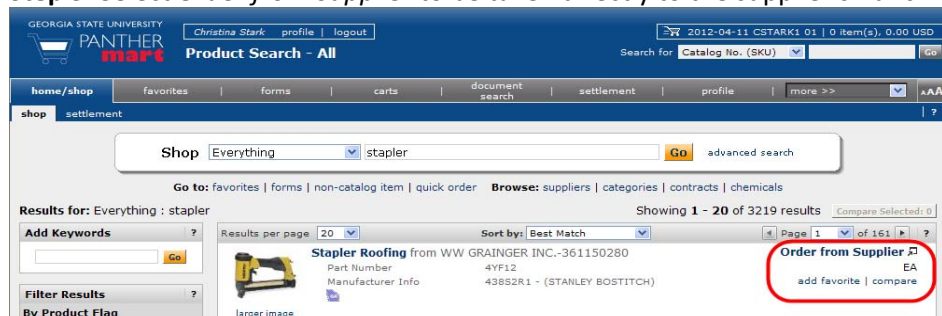
Step 1: Select the Home / Shop tab in the top left corner of the page.

Step 2: Enter a brief description in the search field and select Go.



When an item appears with the phrase *Order From Supplier* it means that the product is listed on the supplier's Punch-Out website.

Step 3: Select *Order from Supplier* to be taken directly to the supplier's Punch-Out website to purchase the item.



C. Punch-Out Supplier's Website

Selecting a Punch-Out link from the Home/Shop page or the *Order from Supplier* link, will direct the shopper to the supplier's website. Since the Punch-Out sites are maintained by the suppliers, the process of selecting an item and checking out might vary slightly. Grainger's Punch-Out site will be used for this example.

If an item was selected in Panther Mart it will take the shopper directly to the item in the supplier's Punch-Out website. If a supplier link was selected from the Home/Shop tab it will take the shopper to the supplier's Punch-Out home page.

Note: To return to Panther Mart without choosing an item, select **Cancel Punch-Out** on the top right of the screen.

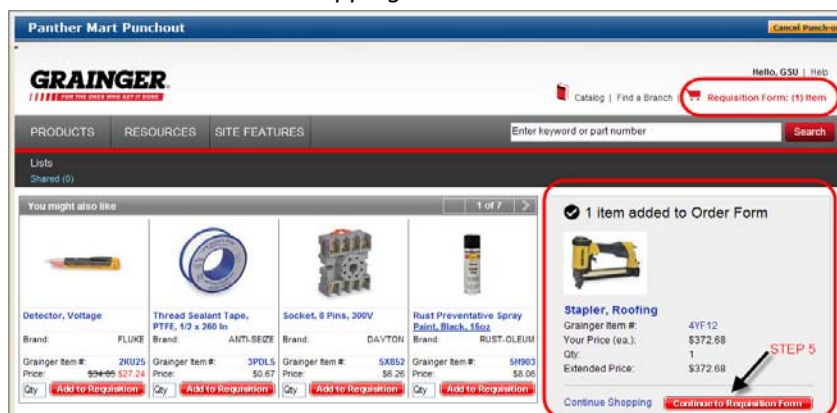
Step 4: Enter the desired quantity and select Add to Requisition.



When an item is selected it will show in the cart as shown in the picture below.

Step 5: Select *Continue to Requisition Form* to return to Panther Mart and purchase the item.

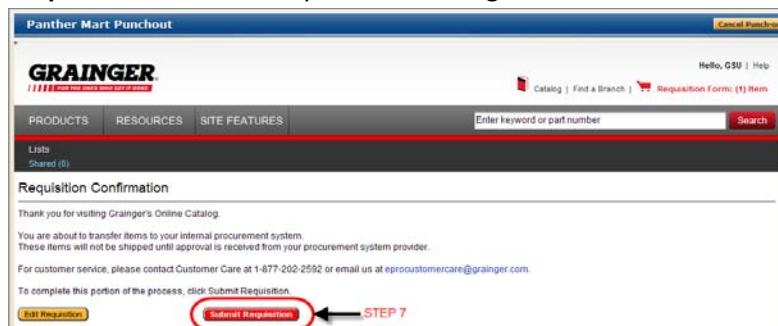
Select *Continue Shopping* to choose additional items.



Step 6: Review the items selected from the Punch-Out site. If everything is correct select *Continue*.

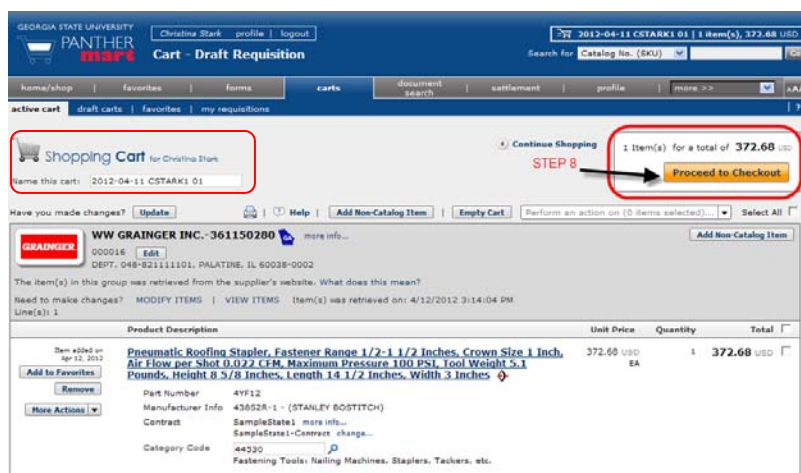


Step 7: Select *Submit Requisition* to bring the chosen items back to Panther Mart cart for purchasing.



Step 8: The item has now been placed in the Panther Mart shopping cart. Continue shopping by selecting Home/Shop tab. When all desired items are in the cart select *Proceed to Checkout* button.

- A. To make updates to the quantity of an item, enter the desired quantity and select update.
- B. To make the cart easier to find later consider changing the name of the cart.



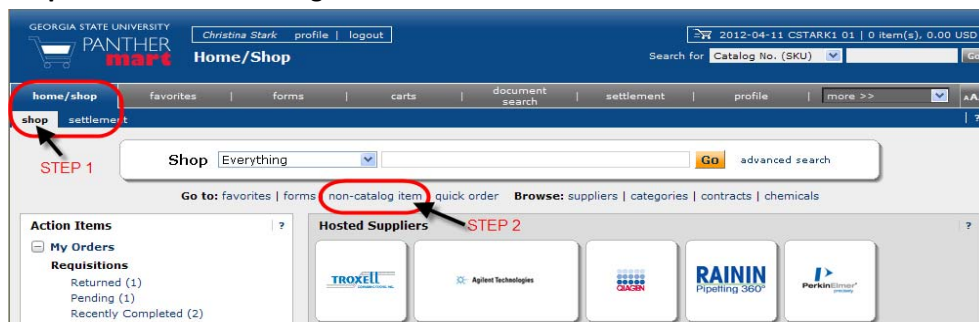
Next: Assigning a cart to a Requestor for reviewing purchase. Please continue on page 13.

III. Non Catalog Item Shopping:

A Non Catalog page is used to purchase items that are not found in a hosted or punch out catalog. This page can also be used to enter information about signed quotes and leases.

Step 1: Select the Home/Shop tab



Step 2: Select Non Catalog Item from below the search field.





The Non-Catalog Item page will appear. Enter the necessary supplier and product/service information.

Step 3: Enter or search for supplier's name

- Some suppliers will have several addresses listed. If the supplier has not indicated which address to use then select the bolded/default address.
- When searching for the supplier there will be icons listed next to the suppliers with Statewide Contracted

Suppliers  or Agency (Georgia State University and Board of Regence)  contract. Suppliers with no icons are Open Market Suppliers.

- Employees  and Students  will also be listed for travel or reimbursement purposes.

Note: If a supplier is not listed, please contact Purchasing to add their information to Panther Mart.

Step 4: Product Description: Enter a brief description or title of the product.

Step 5: Catalog No. Enter the supplier's catalog number. This could also be the part or product number from the supplier.

Step 6: Enter amount that comes in each product by using the Product and Size Fields (use as needed)

Example: If a chemical is sold in containers of 1 milligram of a chemical, enter 1 in the Product field and select mg from the size drop down box.

Step 7: Quantity: Enter the desired quantity of the product.

Step 8: Price: Enter the price of one item.

Step 9: Select Packaging: Select the term from the drop down that indicates how items are priced.

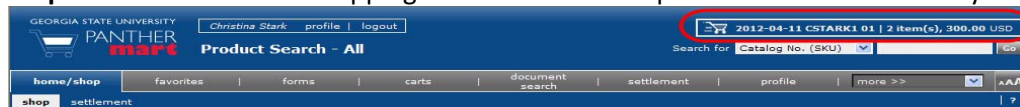
Step 10: Category Code: Enter or search for the category code for the product. Select the category code that most closely matches the purchase. For more information on category codes, please contact Purchasing.

Step 11: Select Any Description box: Select any description box, such as Controlled Substances or Recycled, that describes the product.

Step 12: Select an action

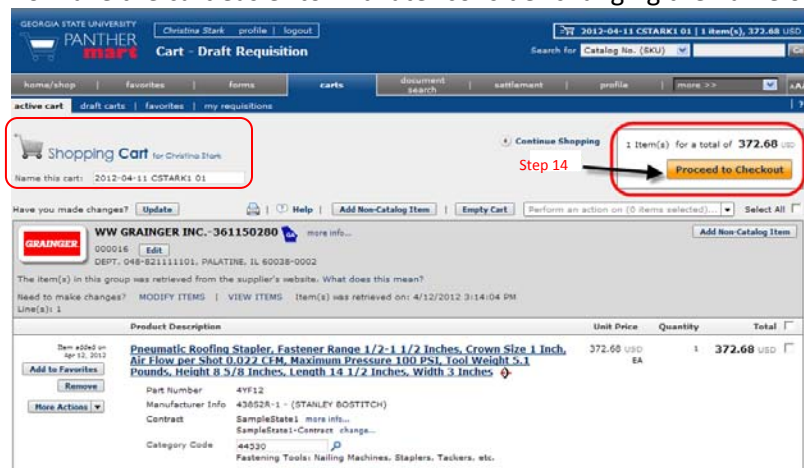
- a. Save and Close- This action will save the information to the cart and close the non-catalog page.
- b. Save and Return- This action will save the information to the cart. The shopper will be returned to Non Catalog Item page to create another Non Catalog purchase.
- c. Cancel- This action will not save the cart.

Step 13: Continue to the shopping cart for review and purchase. Select the cart symbol at the top right of the screen.



Step 14: Review the items listed in the shopping cart, make any needed updates, and then **Select Proceed to Checkout.**

- A. To make updates to quantity, enter desired quantity and select update.
- B. To make the cart easier to find later consider changing the name of the cart.



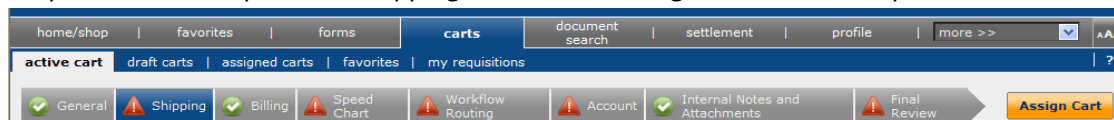
Next: Assigning a cart to a Requestor for reviewing the purchase. Please continue on page 13.

Chapter 4

Assigning a Cart to a Requestor

Once all desired items have been placed in the cart, the shopper will complete the shipping address field and assign the purchase to a Requestor. The Requestor will enter the chartfield and workflow information and submit the purchase.

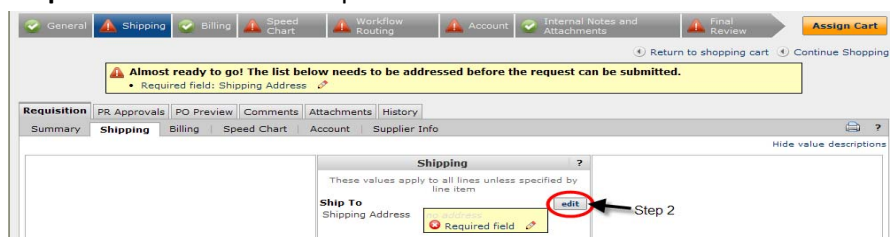
After selecting Proceed to Check Out a new page will appear with several tabs listed across the top. Each tab will have a green check mark or a red triangle. Tabs with red triangles indicate that more information is needed. The shopper will only be able to complete the Shipping tab and then assign the cart to a requestor.



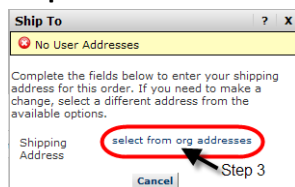
I. Shipping tab:

Step 1. Select the Shipping Tab

Step 2. Select Edit in the Ship To box

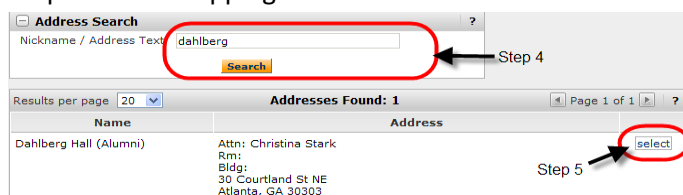


Step 3. A new box will appear and select "Select from Org Addresses"



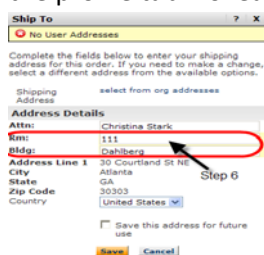
Step 4. Enter the name of the building in the Nickname/Address Text box then select Search

Step 5. Select shipping address



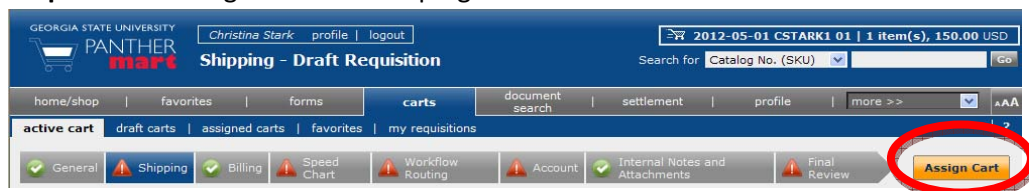
Step 6. Enter Room Number and Name of Building and select Save

Note: To save the address for further use select the check box above save. The address can also be set to default from the profile tab. To learn more about profile set up please see training materials on the Spectrum website.



II. Assigning a Requestor

Step 1. Select Assign Cart at the top right



Step 2. Select search for assignee

Step 3. Enter search information to find the assignee

Step 4. Once the Assignee has been selected, select Assign Cart.

Note: that the assignee can be saved for future use by selecting Add to Profile.

The cart has now been assigned and sent to the next person to complete chartfield and workflow information.

Chapter 5

Finding the Cart After it has been Assigned to a Requestor

The purchase information can be found in different locations depending on where it is in the process. Before the requestor submits the cart it can be found in draft carts. After the cart is submitted and it turns to a Purchase Requisition it can be found under My Requisitions or Document Search.

Step 1: Select Carts Tab

Step 2: The purchase information will be listed under:

1. Draft Carts tab/My Drafts Assigned to Others
2. My Requisitions tab

Note: If the purchase is not listed under My Drafts Assigned to Others, then the cart has probably been submitted by the Requestor changing it to a Purchase Requisition.

Step 3A. Before the cart becomes a Purchase Requisition.

Select Draft Carts then My Drafts Assigned to Others . Next select the printer icon to view the cart.

GEORGIA STATE UNIVERSITY
PANTHER mart
Shopping Cart - Drafts

Bob Godwin profile | logout

Select Draft Cart or Add Item to Cart

Search for Catalog No. (SKU)

home/shop | favorites | forms | **carts** | document search | settlement | profile | more >>

active cart: **draft carts** | assigned carts | favorites | **my requisitions**

Create Cart

My Drafts

Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
	2012-03-24 shopper1 02	3/24/2012		4,350.00 USD	Delete

My Drafts Assigned to Others

View Cart	Shopping Cart Name	Date Created	Assigned To	Total	Unassign
	2012-03-24 shopper1 01	3/24/2012	Christina Stark	5.15 USD	Unassign

Step 3B. After the cart becomes a Purchase Requisition

Select My Requisitions and then choose the number associated with the purchase to view the information.


Results per page: 20 Sort by: Best match

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status
✓ PMT0001031	STAPLES INCORPORATED -042896127	4/27/2012 5:51 PM	765600	Christina Stark	Sent	No Matches
✓ PMT0001030	STAPLES INCORPORATED -042896127	4/27/2012 5:31 PM	765585	Christina Stark	Sent	Partially Received No Matches

Note: This number can be used to find the purchase information under Document Search as well. For more information about Document Search, please see the Spectrum training website.

Appendix A

Glossary

Agency Contract:  Suppliers have been awarded contract for specific items from Board of Regents or Georgia State University.

Approver: Approver has authority to approve the requisition for the department. In some cases the Requestor will also be the first approver.

Cart: The cart is the online shopping tool that holds the details about the items selected for purchase.

Department Approver: Purchases using a department workflow routing will have two approvers. These approvers will be notified about every purchase and will approve purchases over \$2,999.99.

Hosted Catalog: Hosted catalog contains supplier items stored directly in Panther Mart.

Non Catalog: Non Catalog page can be used to purchase items that are not found in a hosted or punch out catalog.

Open Market Supplier: Any supplier that does not have a State Wide or Agency Contract.

Panther Mart: GSU has purchased an eprocurement application from SciQuest. This new application has been branded by GSU as Panther Mart. This new system will be used for purchasing goods, services, processing travel and payment requests.

Project Approver: Purchases using a project workflow routing will have three approvers. These approvers will be notified about every purchase and will approve purchases over \$2,999.99.


Punch-Out Catalog: Punch-Out catalog directs a shopper contracted supplier's website site to shop for items. Once the items are selected from the supplier's website they will be placed in the shopper's cart in Panther Mart. Many of the punch-out suppliers market products that have optional or configurable requirements.

Purchase Order: Once the purchase requisition has completed the necessary workflow, the system automatically completes another budget validation. If funds are available in the budget, the requisition is turned into a purchase order. The purchase order is sent to the supplier and a background process sends the purchase order into PeopleSoft Financials. The purchase order is budget checked in Financials and funds are encumbered. The Purchase Order is a legal binding contract between GSU and the Supplier.

Purchase Requisition: Once a cart is submitted to workflow it becomes a Purchase Requisition.

Requestor: Requestor enters in payment and workflow information to turn the shopping cart into a requisition and submits the cart to approvers. Requestors can also shop for items.

Shopper: The shopper selects items in Panther Mart for purchase and places them in shopping cart for the Requestors.

State Wide Contract:  Suppliers have been awarded a contract for specific items from the State of Georgia.