PantherSoft Financials Fundamentals
Agenda

- Financial Systems & Support Services
- PantherSoft Overview
- Access Request Form
- Log-in
- Navigating PantherSoft
- Employee & Manager Self Service
- Chartfields
- Tips & Tools
- FIU UTS Policy
- Website
- Additional Training
PantherSoft Financials and the FIU Employee

Depending on your Role with the university, you will be granted certain access to PantherSoft Financials

- **ALL Employees** – Automatically granted access to Employee Self-Service for:
  - Travel Authorizations
  - Expense Reimbursements (Travel and Non-Travel related)
  - Asset Control

- **Access Request Form** – for employees tasked with the following Roles\Tasks:
  - Area Budget Manager (Approving Transactions)
  - Hold or Approve a credit card for a department
  - Billing other Departments for services rendered (Smart Billing)
  - Reporting
Financial Systems & Support Services

We provide operational support in the use of the PantherSoft Financials System for the following business modules:

- Purchasing
- Payables
- Travel
- Asset Management
- General Ledger
- Reporting
- Budget Preparation
Financial Systems & Support Services

Our Team provides support for the following:

- User Advisory - Help Desk
- Training
- Open Lab
- Reporting Management
- Accounting Structure Maintenance
- System Maintenance & Upgrades
Financial Systems & Support Services Team

FSSS Associate Controller
Linda Champagne

Business Analysts
Hamza Lazrak, Assoc. Director
Evelyn Izaguirre, Business Analyst
Alejandro Toribio, Junior Business Analyst
Iman Elbadramany, Junior Business Analyst

Student Financials Support
Kristen Baldelli, Assoc. Controller
Cheryl Eades
Darie Dolors

Training:
Customer Service Operations
Hector Pagan, Assist. Director
Gloria A. Guzman, Trainer
Andrew Cardell, Call Center
Shekina Santana, Call Center
Tina Rodriguez, Call Center
Marina Gitelman, Call Center

System Training
Elizabeth Badell, Senior Systems Trainer
Financial Systems & Support Services Contact

Help Desk:
305-348-7200

Office Location:
CSC - 1135

Email:
CONTROLLER@FIU.EDU

Open Lab:
Call the Helpdesk for an appointment

Website:
http://finance.fiu.edu/controller/index.html
Access Request Form

Navigate to:

- panthersoft.fiu.edu
- Click on the “Faculty and Staff Access Request” link
- Click on the “Security and/or Access Request Form” link
Access Request Form

STEP 2 (Access Requested For)

Complete all of the requested information on the "Access Requested For" section.
(a) For "Effective Date", specify the date when the user's security access will take effect.
(b) In order to complete the FIU Department ID and Department Name sections, you can click on the **Chart of Accounts University Departments** link.
(c) "Building and Room" (example PC423 or CSC310)
(d) * required fields

<table>
<thead>
<tr>
<th>PantherSoft ID:*</th>
<th>First Name:*</th>
<th>Last Name:*</th>
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<table>
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<table>
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Last Updated: 07/13/2012 at 01:20 PM
Note: There will be an additional form sent to users requesting access to the Smart Internal billing roles 017, 018 and 019.
Financials System Log-in

Select YES to save your work and proceed with submitting your request. Select NO to go back and make additional changes.

YES  NO
Click the Folder and type in the name of your area Budget Manager. If you do not know the persons name, check with your Dean or Director. Print for your records.
Financials System Log-in

- Navigate to: panthersoft.fiu.edu

- Enter your Panther ID & My Account Password and click "Sign In"
Navigating PantherSoft

- **Search**
- **Folders**
- **Navigation Header**

**Menu**:
- Favorites
- Main Menu
- Personalize
  - Content
  - Layout
- Search:
  - My Favorites
  - Employee Self-Service
  - Manager Self-Service
  - Supplier Contracts
  - Customers
  - Products
  - Promotions
  - Customer Contracts
  - Order Management
  - Customer Returns
  - Items
  - Cost Accounting
  - Vendors
  - Purchasing
  - eProcurement
  - Services Procurement
  - Engineering
  - Manufacturing Definitions
  - Production Control
  - Configuration Modeler
  - Product Configurations
  - Quality
  - Grants
  - Project Costing

**Navigation**
Employee Self-Service

Menu

Search:

- My Favorites
- Smart Solutions
- Employee Self-Service
- Manager Self-Service
- Student Administration
- Supplier Contracts
- Customers
- Products
- Promotions
- Customer Contracts
- Order Management
- Customer Returns
- Items
- Cost Accounting
- Vendors
- Purchasing
eProcurement
- Services Procurement

Employee Self-Service

Travel and Expense Center
- Employee Travel and Expense Center
  - Travel and Expenses
    - Submit/review expense reports, cash advance requests, or travel authorizations.
    - User Preferences
    - Travel Services
    - My Wallet
    - More...

Procurement
- Manage requisitions, receiving, and schedule interviews
  - Manage Requisitions
  - Receiving

Assets
- Use the self-service employee role to manage assets.
  - View/Transfer Assets
Chartfield Combinations

Departmental Tree

College

Division

Activity Nbr

Org Department ID
# Chartfield Combinations

- Sequence of values used to identify & record financial transactions
- Used to determine where money will be coming from or going into with regard to financial transactions

## Required Fields

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<thead>
<tr>
<th>Business Unit</th>
<th>Department</th>
<th>Account</th>
<th>ALT Account</th>
<th>Fund</th>
<th>Program Code</th>
<th>Class</th>
<th>Budget Reference</th>
<th>Project</th>
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## Optional Fields

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<th>ALT Account</th>
<th>Fund</th>
<th>Program Code</th>
<th>Site</th>
<th>Activity Nbr</th>
<th>Budget Reference</th>
<th>Project</th>
<th>Cost PID</th>
<th>Task</th>
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<tbody>
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<td>7 digits</td>
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### Consistent with HR

- Campuses
- Other Sites
- Hospitals

### Use Panther ID

- Currently being set-up for expenses with similar purpose, e.g. CI

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**Florida International University**

Office of the Controller
New Chartfield Definitions

- **Department**: Identifies an organizational unit. To be considered a Department the unit must serve a distinct function or discipline, have a manager with subordinates, and have a budget. This is a common value across all PantherSoft systems (Campus Solutions, HR, Financials).

- **Account**: Identifies transactions based on the object or nature of the event to which they relate. This Chartfield is used to classify transactions in the accounting system such as Assets, Liabilities, Revenues, Expenses or Equity. This Chartfield further breaks down this classification by type such as rent revenue, fees, travel expenses, etc.

- **Alt Account**: Classifies the nature of a transaction utilizing the State standard General Ledger code. Each “account” Chartfield must be mapped to an alternate account. Used for statutory reporting only.
New Chartfield Definitions

- **Fund**: Identifies major funding sources that the University must report separately. Each fund has its own rules for spending and for receiving money.

- **Program Code**: Identifies the primary mission or activity being reported such as instruction, research, public service, administrative support, plant operation and maintenance, financial aid, student activities, etc. Also known as the PCS code and is a required code for State reporting and financial statement preparation.

- **Site**: Identifies the campus or location to which the transaction is identified, such as On-Line, Study Abroad and Medical locations.

- **Activity Number**: To track revenues and expenses for a specific activity using a distinct fund, program code, site and department (organization) string.
New Chartfield Definitions

- **Budget Reference:** Identifies the aid year for financial aid awards. Also used by College of Medicine to identify the academic period.

- **Project:** Tracks projects whereby the University is required to report fiscal activities on a “life-to-date” basis. Typically, the life of these projects crosses fiscal years. This Chartfield will be used for grants and construction projects.

- **Cost PID:** Tracks revenues and expenses for a specific Faculty allocation.

- **Task:** Used to tracks expenses that have a similar purpose that are not identified in another existing Chartfield, for example, Critical Investments.
Chartfield Combination Look-up

- Set up Financials/Supply Chain
- Common Definitions
- Design Chartfields
- Define Values
- Speedtypes
Chartfield Combination Look-up

SpeedTypes

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value  Add a New Value

Limit the number of results to (up to 300): 300
SetID: = FIU01
SpeedType Key: contains 2850120001
User ID: begins with
Primary Permission List: begins with
Type of SpeedType: = Universal (All Users)
Case Sensitive

Search  Clear  Basic Search  Save Search Criteria
*These are the chartfield combinations that a SpeedType field will produce depending on the Dept./Project ID that you search for. These are the ONLY numbers that PeopleSoft will take for a given Dept./Project.
Accounting Defaults

- “User’s Default” is based on the employee’s department

- Transactions within PantherSoft point back to your “Accounting Defaults”

- It may or may not be the desired place where you wish to charge a transaction.

Changing a transaction to another Department or Grant/Project:

- Use the Speedtype function to locate desired Chartfield
- Edit the Chartfield to reflect the new department/project
Tips & Tools

Web Browser Tips:

- Recommend the use of Internet Explorer
- Ensure that Cookies are cleared
- Disable Pop-up Blockers
- Avoid using back arrow for navigation of webpage
- Some of this functionality may require Administrative rights on your computer. Contact UTS 7-2284 if you need to update your Web Browser or Java
Tips & Tools

User Productivity Kit (UPK): An on-demand learning tool, which provides learning activities to assist users in becoming familiar with the Campus Solutions environment:

panthersoft.fiu.edu/financials/onlinetraining.htm
Tips & Tools

FIUchat - An office communicator which uses the FIU contacts contained in the global address book to do the following:

- Online chat
- Desktop & group audio/video conferencing
- Document/screen sharing
FiU Chat

The Division of IT now offers faculty and staff an enterprise-wide Instant Messaging solution named FiUchat. This new system, powered by Microsoft Lync 2010, replaces Office Communications Server 2007 R2. Integrates seamlessly with the FiUmail system, and is available at no cost to FiU faculty and staff.

What does FiUchat do?

FiUchat uses the FiU contacts contained in the global address book on FiUmail as well as any local contacts you have stored in Outlook to do the following:

- Online chat (instant messaging)
- Peer-to-peer/group file transfer
- Desktop, application and group audio/video conferencing/whiteboarding
- Document sharing

Features & Functions

- Instant Messaging/Presence
- Desktop audio/visual chat and conferencing/whiteboarding
- Peer-to-peer/group file transfer
- Integrated presence with Outlook calendar and FiUmail distribution lists/contacts
- Desktop/application sharing and collaboration

Among the many benefits to individual users, the ability to conduct virtual meetings will save time and travel costs when meeting with faculty and staff across FiU campuses and sites. Please take a moment to read through this Web site to find helpful information that should answer the questions you may have regarding the transition.
Tips & Tools

Access FIU Chat

Web Version:
1. Visit chat.fiu.edu (make sure pop-ups are enabled for this Web site)
2. Enter your account information in the “Sign In” fields:
   - Enter “AD.FIU.EDU\username”, username is your FIUmail username (e.g., AD.FIU.EDU.jdooe)
   - Enter your FIUmail password
3. Click on the Sign In button

Client Version:
The software available is copyrighted and only available to FIU faculty and staff. To install FIUchat client:

1. Choose your client version from the links below:
   - PC: Lync 2010 x86/x64
   - Mac: Lync Mac 2010

Please note that there will be both an amd64 and x66 folder in the PC client zip and only the type that matches your machine will be installed. This will upgrade the OCS 2007 R2 client if that is currently installed.

2. If prompted, enter your account information in the “Sign In” fields:
   - Enter “AD\username”, username is your FIUmail username (e.g., ADjdooe)
   - Enter your FIUmail password

3. Extract the client files from the zip files and run the Lyncsetup.exe file and follow the prompts to complete.

4. IT Administrators not on AD.fiu.edu: Below is a link to a vbs script that can be edited and used to remotely deploy the client to your users. It is best run as a login/GPO script and will install/upgrade the right version for the machine type. Departments on AD.fiu.edu do not need to run this script and can contact UTS using the information below for further details on mass client deployment.

   Lync Client for GPO Script

If you do not have administrative rights to install the client on your computer, please contact your office IT support staff. You may also contact the UTS Support Center online at uts.fiu.edu or call 305.348.2284 to request the client.
FIU UTS Policy

At no time will you share or divulge your password to anyone in order to access PantherSoft.
Website & Links

- **FSSS PantherSoft Training:**
  http://finance.fiu.edu/controller/FinSysandSup2.html

- **PantherSoft Training Registration:**
  https://professionaldevelopment.fiu.edu/

- **Policies, Procedures & Manuals:**
  http://finance.fiu.edu/controller/QL_ControllerProceed.html

- **Forms:**
  http://finance.fiu.edu/controller/Forms.html
Additional Training

Travel & Expense
- Overview of T&E Policy
- Creating Travel Authorizations
- Creating Cash Advance
- Creating Expense Reports
- Workflow
- Credit Cards

Purchase to Pay
- Creating Requisitions
- Creating Receipts
- Overview of Business Process
- Workflow

Reporting
- Accounting Review
- Budgeting Concepts
- Overview of Business Process
- nVision Reports
- Crystal and SQR Reports
- Query Reports

Credit Card Training
- Travel & Entertainment Card
- Departmental Travel Card & Card Approvers
- Departmental Dual Use Card & Card Approvers
- Departmental Commodity Card & Card Approvers

Asset Management

Smart Internal Billing

Credit Card Fraud Awareness

Limited Access
- Query Manager Training
- Credit Card Journal Entry

By request only - Financial Budgeting and Accounting

Office of the Controller

FIU
Florida International University
Questions ?