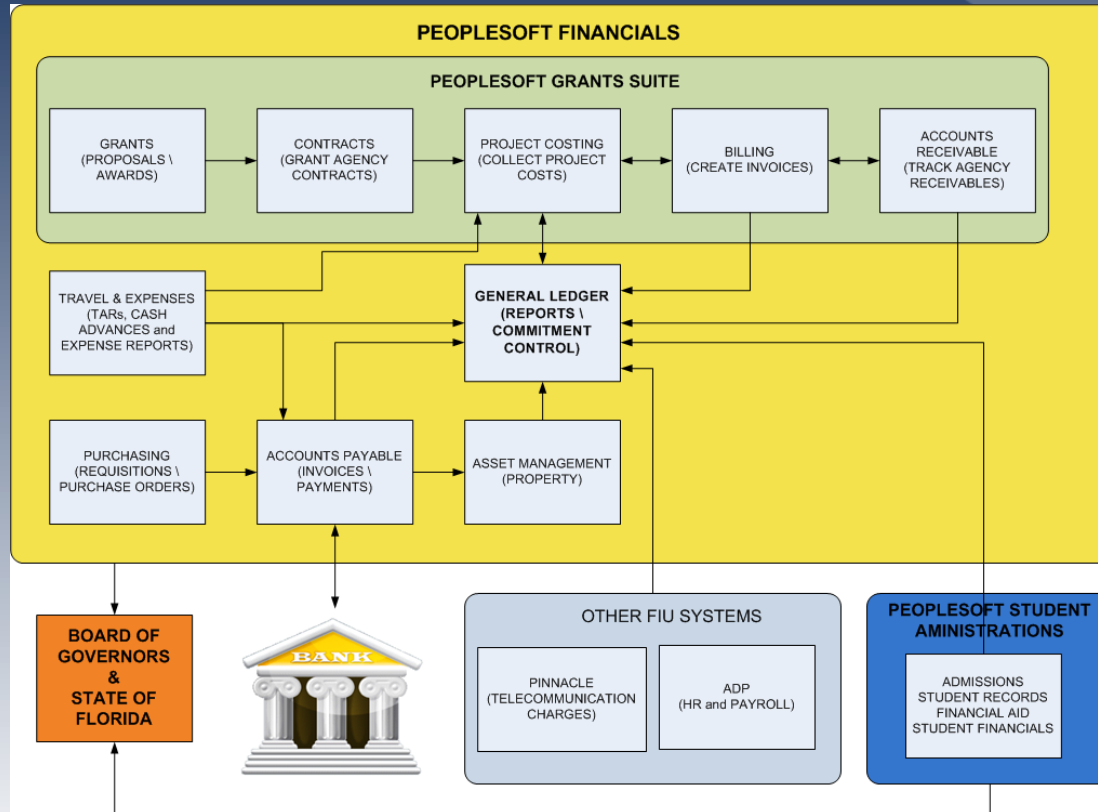


New Employee Introduction to PantherSoft Financials

What is PantherSoft?



PantherSoft is FIU's Enterprise Resource Planning system whereby all of the major business processes between students, employees, vendors, and other entities are conducted. (Financials, Student Administration and HR\Payroll)

PantherSoft Financials and the FIU Employee

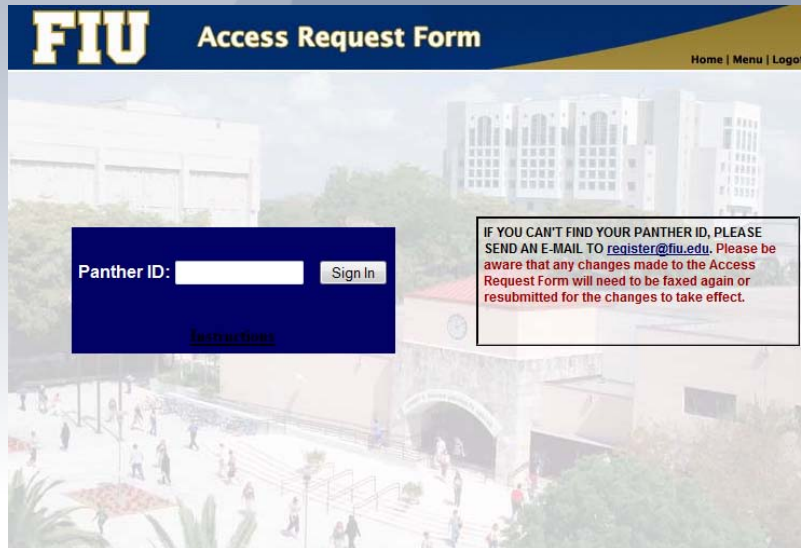
Depending on your Role with the university, you will be granted certain access to PantherSoft Financials

- ALL Employees - Automatically granted access to Employee Self-Service
 - Travel Authorizations
 - Expense Reimbursements (Travel and Non-Travel related)
 - Asset Control (to be implemented in near future)
- Employees tasked with the following Roles\Tasks:
 - Area Budget Manager (Approving Transactions)
 - Order Services and Commodities for Department
 - Reporting
 - Department Travel Liaison
 - T&E Cardholder

Requesting Access to PantherSoft Financials: Access Request Form (ARF)

By being an FIU employee you have basic access to PantherSoft Financials. However, the ARF will allow you to select additional security roles that you will need to perform your position duties.

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



FIU
Access Request Form
Home | Menu | Logoff

STEP 3 (Access Requested) (Mark the Access Codes you are requesting and press continue.)

Access Code	Access Name	Please Select	Description
001	Inquiry & Reporting	<input type="checkbox"/>	User will be able to run queries on, and have Vendor, Voucher, Requisition, Purchase Order, General Ledger, Asset Management, Grants and Budget inquiry access to the FIU Financials System.
002	Requester Authorization	<input type="checkbox"/>	User will be granted security to create requisitions in the FIU Financials System and enter receipts for purchased items that are received at the department, not in Central Receiving.
005	Budget Exception Notifications	<input type="checkbox"/>	User will be notified daily when Budget Exceptions (Errors and Warnings) occur for the Departments selected.
006	Budget Transfer Initiator	<input type="checkbox"/>	User will be granted security to enter budget transfers for the Department ID he/she has permission to.
007	Budget Transfer Approver	<input type="checkbox"/>	User will be granted security to approve or post budget transfers entered by the Budget Managers for the Department ID he/she has permission to.
012	Student Assistantship \ Grants & External Award Management	<input type="checkbox"/>	This role will allow users (Principal Investigators and their staff) with the ability to process Grants and External Awards to students.

Training Classes <http://finance.fiu.edu/controller/TrainingCalendars.html>

Financials Fundamentals

- Basics of Panthersoft Financials

Travel and Expense

- Creating Travel Authorization
- Creating Cash Advance
- Creating Expense Report
- Workflow (All business processes)
- Brief Overview of T&E Policy
- Travel & Entertainment Card
- Departmental Travel Card

Procure to Pay(P2P)

- Creating and entering requisitions
- Entering Receipts
- Overview of P2P Business Process Flow
- Workflow
- Commodity Card

Financial Reporting

- Perform Variance Analysis
- Available Budget
- nVision Reports
- Overview of Business Processes

Credit Card Solutions

- Departmental Commodity Card
- Departmental Travel Card
- Credit Card Approval

Training Sign-up

To sign up for a specialized class in either **Fundamentals**, **T&E**, **P2P**, or **Reporting**:

1. Go to www.peopleware.net/2898
2. Select the 'Controller's Workshops' link.
3. Select the link pertaining to the desired training.
4. Choose the class for the particular day that you want, and follow the on screen prompts.

For first time users the system will have you enter in your FIU Information (Panther ID, Name, FIU E-mail, and supervisor) to create an account. You can use your account to sign up for the selected class.

How to contact us:

Helpdesk:

305-348-7200 (8:30am – 5:00pm)

Email:

GLMAINT@FIU.EDU

Website:

<http://finance.fiu.edu/controller/FinSysandSup.html>

Questions?