Spectrum User Group Meeting  
Friday, February 15, 2013  
10:00 AM – 11:11 AM  
220 Urban Life Auditorium

Topic: Purchasing Updates  
Presenter: Michael Davidson

Automatic PO Close Process:

Bob Godwin in the Spectrum Office has developed an automatic close process for purchase orders. These POs must meet the following requirements in order to close.

- The total PO amount, total voucher amount and total payment amount must equal.
- The Final Invoice-Close PO box must be checked.

Departments can notify Disbursements of final payment by selecting final payment on the Travel Expense Statement.

![Travel Expense Statement - Employee and Student](image)

There are a few queries you can run to determine which POs have outstanding encumbrances. Please see list below:

- GSU_PO_OPEN_ENC_BY_DEPT_RANGE
- GSU_PO_OPEN_ENC_BY_DATE_RANGE
- GSU_PO_ENC_VCHR_PAID

Navigation in Spectrum: Reporting Tools > Query > Query Viewer  
Type query name in text box listed below

![Query Viewer](image)

Copiers:

To renew a copier lease, complete the Copier Renewal Form in Panther Mart. On the Home/Shop > Shop Page of Panther Mart, go to Forms section and select Copier Renewal Form. Complete Form, select ‘Add and go to Cart’ and press Go. Continue processing this form as you would an on-line purchase, non-catalog item or other form. This form is for informational purposes only and will be routed to Purchasing for processing.
When the lease is up on a copier, a notification for pick-up will need to be sent to the supplier. Please start this process 2 months prior to the end of lease.

Because sensitive information and documents are stored on the copier hard drive, it is imperative that you have the hard drive wiped clean before returning the copier to the supplier. The supplier charges a fee to have this done. This cost can be included on your monthly invoice or you can have the supplier send the hard drive back to you for a charge and Receiving can wipe the hard drive clean.

Question: If you have a 36 or 48 month lease and nothing has changed since completing the copier renewal request form on last year, can you send a spreadsheet to department listing all copier renewals. This spreadsheet will specify by column 1) YES changes to copier lease or 2) NO changes to copier lease.

Answer: No, we must have the copier renewal form completed to serve as Purchasing’s approval to encumber funds from your departments budget. Prior year copier renewal forms can be copied to a cart and updated to make the process easier on departments.

Going Green: Much emphasis has been placed on going green. Going green benefits our environment in several ways. Purchasing recycled products benefits our environment by reducing landfill volumes. Glass, plastic, aluminum takes a long time to decompose in a landfill. If these products are used over and over again, we benefit and our environment benefits. Fewer chemicals are released into our air, which impacts our health in a positive manner. Also, money is saved through going green.

Purchasing urges you to go green. Make a concertize effort to purchase items that are recycled, have the energy star or green symbols. Let’s join forces to save our planet!!!

Topic: Disbursements Updates Presenter: Jean Pearson

Travel

On many occasions, travel POs are being closed before the expense statement is completed by the Traveler; and the voucher is created and paid. Please ensure the payment has been made to the Traveler before you request a travel PO to be closed.
The travel authorization form is in the process of being changed. The changes you will see on the updated form are:

- **Change to Per Diem Meal Expense**

<table>
<thead>
<tr>
<th>Description</th>
<th>Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>First/Last Day of Travel (Reimbursed at 75% of Per Diem)</td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
<tr>
<td>Full Travel Day(s) (Reimbursed at 100% of Per Diem)</td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>0.00</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Change to International Travel**

<table>
<thead>
<tr>
<th>Is this form for International Travel?</th>
</tr>
</thead>
<tbody>
<tr>
<td>If Yes, Complete the International Travel form: International Travel Form</td>
</tr>
<tr>
<td>Internal Attachments</td>
</tr>
</tbody>
</table>

  **Question:** Once you complete and submit the International Travel Form, will you be notified.

  **Answer:** You will not be notified by PantherMart. The International Travel Form that you submit is handled by the Office of International Initiatives. Per my discussion with Ms. Kike Ehigiator, Director of International Initiatives & Partnerships, a confirmation message is sent to users when they successfully submit their travel information. A report which includes Traveler’s Name, GSU Department, Destination, Departure Date and other pertinent information such as reason for trip can be generated for colleges and units.

  **Payment Request Form Reminders:**

  1. Make sure the invoice is attached to the Panthermart payment request form.
  2. Make sure all pages of the invoice are attached. Some vendors may use the front and back pages of an invoice. The back pages are almost always missed when scanning. If one of the pages numbered has no valid information, Disbursements will still need this page for their records.
  3. Make sure the remittance portion of the invoice is attached. This confirms where the payment should be mailed.
  4. When you select a Vendor ID Number, please make sure the correct remittance address is listed in Panthermart. If it is not listed, please contact Purchasing to update the address before you enter the requisition.

  **Question:** Why is my payment request PO closed?

  **Answer:** Payment Requests POs are automatically closed in Panther Mart when the voucher is created. The process is as follows: User completes payment request form and adds to cart. The cart is turned into a purchase requisition (PR) when you press the Submit Requisition button. Once the PR completes workflow approval and validation, a purchase order (PO) is created. Then, a voucher is
automatically created from the PO. The PO and Voucher are exported to the Spectrum System. After this, payments are created for vendors.

Receipt Reminders:

- As of Wednesday, February 13th, Disbursements identified, roughly, 550 PO’s that have invoices pending payment. However, Disbursements cannot make these payments until a corresponding receipt has been entered into Panther Mart.
- Disbursements will have a listing of these PO’s available for the departments to review on or before Tuesday, February 19th.
- When an invoice has been received and receiving has not been completed in Panther Mart, a system-generated notification will be sent to end users reminding them to enter a receipt. Please be sure that this notification is active in your user profile.
- If you are unsure how to create a receipt, please review the Panther Mart Receiver Guide, located on the Spectrum website under Training Guides and Quick References for Panther Mart.

http://www.gsu.edu/spectrum/39793.html

Tools for Processing Payments:

Three hand-outs were given to users to assist with processing payments. These documents are attached: Travel Overview (Revised 02/15/2013), The Importance of Editing Account Codes and How To Locate Payment Information in Panther Mart. Listed below are two URLs (Payment Type Chart and for Disbursements Policies and Procedures) that will aid you in processing transactions.

http://www2.gsu.edu/~wwwfas/FinancialOperation/PaymentTypesChart_PantherMart.pdf

http://www.gsu.edu/accounting/disbursements-policies-procedures.html

Topic: Spectrum Update  Presenter: Mary Franklin

Please submit a help ticket for any issues you have in PantherMart or Spectrum. This allows the Spectrum Office to track issues centrally and to identify common problems users are having so that we can address them expeditiously. You may do so by email, help@gsu.edu or by phone at (404) 413-4357.

Also attached is a document for the most common error messages you may receive when a requisition is returned and how to resolve these error messages. Also attached, you will find instructions for how to register for training workshops.
Training:

The scheduled dates for Spectrum/Panther Mart Training for calendar year 2013 are as follows:

- March 25 – March 28, 2013
- May 20 – May 23, 2013
- July 22 – July 25, 2013
- September 23 – September 26, 2013
- November 18 – November 21, 2013

Training is held on the same days and times each month. See Days and Times of each class below:

- Monday 9:00 AM – 12:00 PM Introduction to Spectrum/Panther Mart
- Monday 2:00 PM – 4:00 PM Spectrum Journal Entry
- Tuesday 9:00 AM – 12:00 PM Spectrum Reports
- Wednesday 9:00 AM – 1:00 PM Panther Mart Requestor
- Thursday 9:00 AM – 12:00 PM Panther Mart Payment Request/Travel

Training Guides, Quick Reference Guides and Videos:

http://www.gsu.edu/spectrum/38150.html