Approver User Guide

PANTHEREXPRESS | BUYING & PAYING

Accessing the System

1. Open your web browser and go to www.my.pitt.edu
2. Enter your Username and Password in the Student, Faculty & Staff section. Click on "Log In".
3. Scroll down the Home page, and click on the "Log into PantherExpress" link in the lower right hand side of the Home page.

PantherExpress Approval Levels

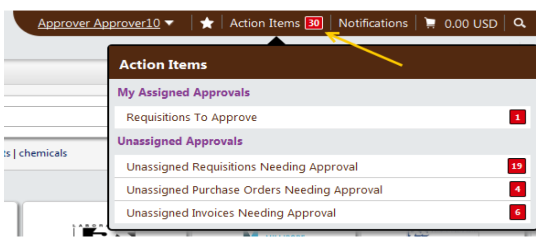
There are 3 Approval Levels in PantherExpress:
$0 - $500.00; >$500 - $5,000; >$5,000

- Each department must have at least one person at each approval level.
- An Approver can be listed at one, two, or all three approval levels.
- All orders over $5,000 will go to Purchasing Services after departmental approval.
- Every department must have at least one department buyer or approver to serve as the OK-to-Pay Approver.
- Approvers are notified via email when a document has been routed for their approval. The email contains a link that takes the recipient directly into the appropriate area.

Approval Navigation

N → Home → Action Items (Top right hand side of the Home/Shop page)

- *Action Items* will always be viewable in the *Review* section.
- The Action Items allows you to access all your assigned approvals, unassigned requisition, PO and invoice approvals.



Approve an Order

NOTE: To approve/reject an order you must first <u>assign</u> the order to yourself.

1. Click on the unassigned requisitions link (under Action Items) or click on *Orders and Documents menu* in the menu bar.
2. Expand the approval folder(s) to view the requisition(s). Click on the requisition number to view the contents of the order.
3. Scroll to the top of the page and select [Approve/Complete Step] from the *Available Actions* drop down menu.
4. Click [Go].

Modify an Order

NOTE: To modify an order you must first <u>assign</u> the order to yourself.

1. Locate the order to be approved.
2. Click on ☑ and [Assign] then click [Go].
3. The requisition will automatically move to [My PR Approvals [10 results]] at the top of the screen.
4. Locate the order to be approved, and click on the requisition number.
5. Edit the order (such as Ship-to location, Quantity, Account Number, etc.)
6. Save your changes.
7. Scroll to the top of the screen.
8. Select [Approve/Complete Step] from the *Available Actions* drop-down menu.
9. Click [Go].

Reject an Order or a Line Item in an Order

NOTE: To reject an order you must first <u>assign</u> the order to yourself.

1. Locate the order to be rejected.
2. Click on ☑ and [Assign] then click [Go].
3. The requisition will automatically move to [My PR Approvals [10 results]] at the top of the screen.
4. Locate the order to be rejected, and click on the requisition number.
5. Select each item to reject by clicking on the box ☑ at the end of the line item.
6. Scroll to the top of the *Supplier /Line Item Details* area.
7. Select [Reject Selected Items] from the drop down menu.
   Click [Go].
8. In the pop-up window, enter a reason for rejecting the order.
9. Click on the [Reject Line Item] button.
10. Scroll up to the *Available Actions* drop down menu.
11. Select [Approve/Complete Step]
12. Click [Go].

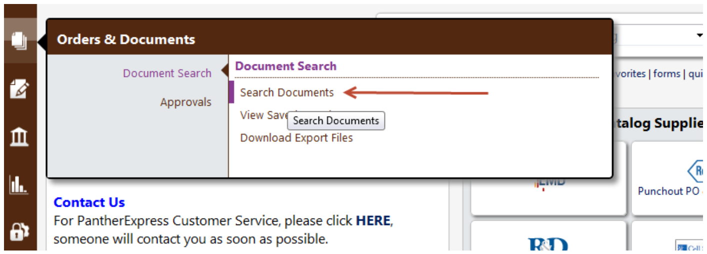
Note: You cannot reject individual lines items on a Punch-out order. All lines must be rejected and a new order be created for the "good" line items.

Review Order History by Department

Departmental approvers, with the appropriate permissions, are able to not only see the history of orders they placed, but all other orders placed within their department.

Approver User Guide

1. Access the *Document Search* section of the application.



2. Select a *Search* option to search for the order by choosing from the dropdown menu. (*All Documents, Requisition, Purchase Order, Invoice*).
3. Optionally, enter the purchase order number.
4. Specify a date range by choosing a date range from the All Dates dropdown menu, if appropriate.
5. Click the **Go** button.
6. View your search results.

Use the **Advanced Search** option for more detailed search functionalities, e.g., *Prepared by*, *Approved by*, *Supplier*, *Cat. #*, *Account No.* etc.

Search Across All Document Types

1. Access the Document Search section of the application.
2. Choose the **Search** All Documents search option.
3. Enter a requisition number, purchase order number, invoice number etc.
4. Click the **Go** button.
5. View your search results.

OK-to-Pay

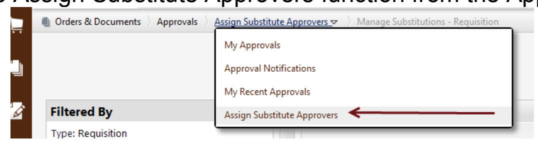
- Any order over $5,000 will not be paid until designated as "OK-to-Pay".
- Every department must have at least one designated OK-to-Pay Approver. This person can be a department buyer or approver.
- Any order over $5,000, once approved and sent to the supplier, will automatically go to the OK-to-Pay folder. An email will be sent to the designated OK-to-Pay Approver.
- When the product arrives on campus, the person who receives the order should inform the designated OK-to-Pay Approver.
- The designated approver will locate the order in the OK-to-Pay folder, assign the order to himself, and select *Approve/Complete* from the drop down menu of available actions.

Assign a Substitute Approver

In the event an approver is absent or does not have access to the application, he can designate another approver as his substitute.

- The substitute is able to review documents routed to the original approver.
- Substitutes are assigned at the manage substitution sub-folder from the Approvals screen.

1. Access the Assign Substitute Approvers function from the Approvers menu.



2. Determine for which folder(s) you would like to set up a substitute approver. Place a check in the checkbox next to each approval folder you are assigning to a substitute.
3. Select the **Assign** button (found on the right side for each folder) or the Assign Substitute to Selected Folders **Go**
4. Enter specific criteria to find the recipient of the person substituting (First name, Last name, email, etc.)
5. Click the *Assign* button.
6. Click on [select] to assign that individual as the substitute.
7. Click on **Remove** to remove the substitution setting for a folder, or the **End Substitute for All Requisition Folders** to remove the substitution settings for all folders.

Forward Purchase Requisitions

This function is provided so that a requisition can be forwarded to a different approver for review, if needed.

1. Access the *Approvals menu* of the application.
2. Select ☑ the orders that are to be forwarded to another approver.
3. Select Forward to ... from the drop down menu; Click **Go**.
4. Enter the last name of the person to forward to; Click **Search**.
5. Select the correct user; Click on [select].
6. Enter a note for the selected approver.
7. Click on **Forward** to send the requisitions.

To Get Help

Please go to http://cfo.pitt.edu/pexpress/CustomerService/purchasing/pantherbuy.php

and complete the ***Contact Us Form.***