Approving Orders in PantherExpress

Chapter 5
Approving Orders in PantherExpress

Section Objectives

At the end of this section, you should be able to:

- Understand different approval levels
- Navigate to the Action Items area to view pending approvals
- View Department Folders for requisitions pending approval
- Assign pending requisitions to self
- Approve pending requisitions
- Modify requisitions
- Reject requisition line items
- Return orders to requisitioners
- Forward pending requisitions to another approver
- Assign a Substitute Approver for an extended absence
- Check the status of orders after action has been taken by an approver
- Search for all orders approved
Approving Orders in PantherExpress – Approval Levels

Approval Levels

Department Buyers
Department Buyers in PantherExpress can have three different levels of dollar spending: $0, $500, and $5000.

- If they have a $0 spending limit, every order placed will require approval.
- If they have a $500 spending limit, they can place orders up to $500 without approval; however, if that buyer places an order that is over $500, it will require approval.
- If the buyer has a $5000 spending limit, they may place orders up to $5000 without approval; however, any order over $5000 will require approval.

Approvers
Approvals in PantherExpress will occur at a department level. There are three levels of Approvers. Each department must have at least one person approving at each level. Those levels are: $0-$500, $500.01-$5000, and $5000.01 and above.

- An approver at the $0-$500 level will see ALL orders requiring approval from $0 up to $500.
  For example, if a buyer who has $0 approval places an order for $350, it will go to the approver(s) who are listed in the $0-$500 range. Once an approver at this level has approved the order, it will go to the vendor.

- An approver at the $500.01-$5000 level will see ALL orders requiring approval greater than $500.01 up to $5000.
  For example, if a buyer who has either $0 or $500 approval places an order for $1000, it will go to the approver(s) who are listed in the $500.01-$5000 range. Once an approver at this level has approved the order, it will go to the vendor.

- An approver at the $5000.01 and above level will see ALL orders greater than $5000.01.
  For example, if any buyer, regardless of dollar approval level, places an order for $10000, it will go to the approver(s) who are listed in the $5000.01 and above range. Once an approver at this level has approved the order, it will go to Purchasing Services for further approval.
Approving Orders in PantherExpress – Approval Levels

OK-to-Pay

The final approval setting is the $5000 OK–to-Pay feature. As per University policy, purchase orders over $5000 are not to be paid until the funds are released by the department placing the order. Every department **MUST** have at least one designated $5000 OK-to-Pay Approver.

This person can be either a department buyer or an approver who is at the $5000 level. Orders over $5000 will automatically go to the OK-to-Pay folder and an email will be sent to the appropriate Approver(s) that there is an order pending OK-to-Pay.

The OK-to-Pay Approver will receive only one email regarding the order. This email will arrive when the order is received by the supplier. When the product arrives on campus, the person who receives the order should inform the designated Approver and they can release the funds in PantherExpress.

For example, Strategic Sourcing places an order for $6500 worth of computers. After this order has gone through all the approvals, it will be sent to the vendor. The order **will not** however, be paid until Strategic Sourcing receives the computers and their designated OK-to-Pay Approver goes into PantherExpress and completes the OK-to-Pay step.

**IMPORTANT NOTES:**

- Each department **MUST** have at least one person at each approval level.
- An approver can be listed at one, two or all three levels of approval.
  
  For example, if Andrew Smith wants to be able to approve all orders in his department that require approval, he can be placed on all three levels.
- Each approval level can have multiple people listed at that level.
  
  For example, if Supplier Management wants to have three people approving orders at the $0-$500 level, two at the $500.01-$5000 level, and one at the $5000.01 and above level, this is possible.
- If your department has multiple approvers listed at any level, then any approvals that fall into that level will be placed into a shared folder in the **Review** section of the Home page.
  
  For example, a buyer with $0 approval in Supplier Management places an order for $350. This order will go into a shared folder for approval. If Supplier Management has three approvers at the $0-$500 level, any one of those three approvers will have access to the folder to view, modify and approve the order. It will only require the approval of one of the approvers.
- All orders over $5000 will go to Purchasing Services after departmental approval.
- Every department must have at least one Approver with a $5000 level to serve as their OK-to-Pay approver.
- If you are unsure what your approval limit is, please contact your department administrator. If he/she does not know, please contact PantherExpress via email.
Approving Orders in PantherExpress – Assign/Approve

Navigating to and Reviewing Requisitions

Locate the area on the home page labeled *Action Items*. This is where all requisitions which are pending approval will appear.

1. Log out as the Department Buyer.
2. Log back in as the designated Approver.
   - app#
   - password
3. Navigate to the *Action Items* section on the Home Page.

`PantherExpress
N → Home → Action Items`
**Approving Orders in PantherExpress – Assign/Approve**

Note: You can also access your approvals by navigating to the *Orders & Documents / Approvals* fly-out menu on the side bar menu on the left hand side.

4. Under the Action Items, approvers can select either assigned or unassigned requisitions and/or purchase orders to view and approve.
**Approving Orders in PantherExpress – Assign/Approve**

- To view more details about the requisitions pending approval (i.e. req. number, vendor, requisitioner, requisition dollar amount) click on the **expand all** link at the top of the approval folders.

- To view more details about the requisitions pending approval (i.e. cart name, vendor, number of line items, days in folder) click on the **Show requisition details** link at the top of the approval folders.

- Any orders waiting to be approved will appear in the lower portion of the page and will be divided into folders based on the approval level. The approver in the above screen shot has level two ($500.01 - $5000) and level three (over $5000.01) approval limits.
Approving Orders in PantherExpress – Assign/Approve

- To look at a requisition prior to assigning / approving an order, click on the *Quick View* icon next to the requisition number.
  - Since the only detail about the orders that is visible is the Total Amount of the order, if the Requisition number is not known, click on the *Quick View* icon to find the order to be approved.
Approving Orders in PantherExpress – Assign/Approve

5. Locate the requisition to be approved.
   - Computer equipment from Dell @ $2537.32.
   - You can also locate your requisition via the requisitioner name.

6. Click on Assign in the Action column.
   - The Requisition will automatically move to the My PR Approvals folder.

   *Note: If you would like to approve an order directly from this area, place a check mark at the end of the line item and select Approve/Complete from the drop down menu and click “Go”.

7. View the order to make sure it is correct.
   - Scroll to the top of the page and select Approve/Complete from the drop down menu.

8. Click Go. The order has been approved.

9. Once approved, the order is assigned a PO # and sent to the supplier.
Approving Orders in PantherExpress – Modify

Modify the order for the radioactive materials by changing the account number. Orders must be assigned to yourself before you can modify them.

1. Navigate to the Approvals menu.

   PantherExpress
   N → Home → Orders & Documents → Approvals

2. Locate the order to be approved.
   - This order will be the only order left in the folder for orders between $500.01 - $5000.

3. Click on **Assign**

   - The Requisition will automatically move to My PR Approvals at the top of the screen.

4. Click on the requisition number.
   - The Requisition will open and all fields will now be editable.

5. Go to the Accounting Codes section.
   - Click on *edit*.
   - Change the account no. to 02.49010.6010.00000.000000.00000.

6. Click on **Save**

7. Select Approve/Complete Step from the drop down menu.

   Approve/Complete Step ✗ Go

8. Click on **Go** to complete the approval process.
   - Once an order is approved and completed, the system automatically returns to the approvals page.
**Approving Orders in PantherExpress – Reject**

Reject the order for the overhead projector and motorized screens.

1. Navigate to the Approvals page.
2. Locate the order that is over $5000.
3. Assign the order.
4. Click on View.
5. Select “Reject Requisition” from the drop down list. This action rejects the entire order.
6. Click Go.

- In order to **reject an entire multi-line** order, select “Reject Requisition” from the drop down menu at the top right hand side of the requisition.
- When an order is rejected, the department buyer or shopper will receive an email notification.
- **A rejected order cannot be modified.** Once an order is rejected, if it needs to be modified, the shopper or buyer must copy the original order to a new cart, and modify the copy.
- Add the items into the new shopping cart by selecting the items and selecting **Add to Active Cart** from the drop down menu in the Supplier/Line Item Details section.
**Approving Orders in PantherExpress – Reject**

To Reject individual line items:

1. Scroll to the top of Supplier / Line Item Details.

2. Select the line item(s) you are rejecting by clicking in the checkbox at the end of the line.

3. Select **Reject Selected Items** from the drop down menu.

   ![Reject Selected Items](image)

4. Click **Go**.

5. After clicking on **Go**, a new window will pop up.
Approving Orders in PantherExpress – Reject

6. In the text field enter the reason for rejecting the order. Then click on the 
   Reject Line Item button.
   
   - When items are rejected, they remain in the order with a Pending, but line item(s) 
     Rejected icon in front of the item description.

7. Scroll up to the Available Actions drop down menu.

8. Select Approve/Complete Step.

9. Click Go.

10. An example of the rejection email notification follows on the next page.
Approving Orders in PantherExpress – Reject

-----Original Message-----
From: support@loquax.com [mailto:support@loquax.com]
Date: Wednesday, March 13, 2013 2:51 PM
To: testbuyer@gmail.com
Subject: Your Requisition has been Rejected, Requisition #: 136464

Re: LINE ITEM(S) REJECTED FOR REQUISITION #: 136464 Requisition Name: 2013-03-08 dbt1.02 Prepared by: Department Buyer1 Rejected by: Test Approver

Dear Department Buyer1,

The requisition listed above has been rejected.

Your Approver has rejected all line items in this requisition.

Check either the 'My Approval' or 'History tab' of the Requisition to determine why you received this email.

You can review the details of this requisition online by using "My Requisitions", or by selecting the URL below:

https://loquax.com/apps/LoquaxPortalSummary?groupId=999468681f0f7f49e04602556795d1c-My_Requisitions&groupId=999468681f0f7f49e04602556795d1-My_Requisitions_Single_Spark&groupId=https://loquax.com/apps/loquax/My_Requisitions_Single_Spark?groupId=999468681f0f7f49e04602556795d1

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If you have any questions with regards to this requisition, please contact the approver who rejected the requisition or your PantherBuy Support Team.

Support Team Contact Information:
PantherBuy@f0.pitt.edu

Thank you,
The University of Pittsburgh

Rejection email notification
Approving Orders in PantherExpress – Return Order to Requisition

Returning the order to the requisitioner is a way to return the order without rejecting it. This can be used when an approver would like to have a different account number placed on the order.

1. Navigate to the Approvals page.
2. Locate the order.
3. Assign the order.
4. Click on View.
5. Review the order.
6. Notice that the wrong account number was used and needs corrected.
7. Scroll to the top of the page and to the “Available Actions” drop down menu.
8. Select Return to requisitioner.
9. Click on the Go button.
10. You will receive a pop up box. Type in an explanation of the return.

The requisitioner will then receive an email notifying them that their order has been returned.
Improving Orders in PantherExpress – Return Order to Requisitioner

--- Original Message ---
From: support@ulicquest.com [mailto:support@ulicquest.com]
Sent: Thursday, April 07, 2011 11:12 AM
To: User, PantherBuy
Subject: Your requisition has been returned. Requisition#: 515243

Re: REQUISITION RETURNED FOR REQUISITION#: 515243
Prepared by: PantherBuy User
Returned by: Department Approver

Dear PantherBuy User,

This requisition has been returned. To modify or resubmit the requisition go to the “Draft carts” page using the URL below. You can obtain information on why this requisition was returned by looking at the comments or history tabs of the “Draft cart”.

Your requisition may have been returned for one of several possible reasons:
1. The account number that has been used is invalid or not in the active chart of accounts.
2. You have attempted to order from the Stockroom and did not use subcode 6688.
3. You attempted to purchase items using the 6688 subcode from a supplier other than a Stockroom.
4. Subcode 6688 can only be used for Stockroom-related


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If you have any questions with regard to this requisition, please contact the approver who returned the requisition or the PantherBuy Team.

Support Team Contact Information:
PantherBuy@pitt.edu

Thank you,
The University of Pittsburgh

The following notes were attached to this requisition during the workflow process:
Invalid Account

12. The returned requisition will appear under the users Action Items section.

13. Once the user has pulled the returned requisition up, there are multiple ways that the individual can check to see why the requisition was returned:

- Through the Comments tab.
Approving Orders in PantherExpress – Return Order to Requisitioner

- Through the History tab.

14. Once the order is corrected, it can be submitted as usual.
Approving Orders in PantherExpress – Forwarding PR(s)

There may be instances where an approver may feel as though another individual is a more appropriate approver for a particular request. This function is provided so that the Requisition may be sent to a different approver for review.

A user can forward a requisition(s) awaiting approval, either before or after assigning the requisition to oneself.

- In either case, the steps to forward the PR(s) are the same.

1. Navigate to the Approvals page.

   PantherExpress
   N → Home → Orders & Documents → Approvals

2. Select the order(s) that are to be forwarded to another approver.
   - Click on the box at the end of the line for each requisition to forward.

3. Select Forward to from the drop down menu.

4. Click on the button.

   A new window will pop up.

5. Enter the last name of the person to forward the PR to.

   Note: You will only be able to find a person who has Approver Status in the PantherExpress system. You cannot forward a requisition to a Department Buyer or a Shopper.

6. Click on Search.
   - Select the correct user by clicking on [select] next to their name.
Approving Orders in PantherExpress – Forwarding PR(s)

7. After selecting the user, the window will disappear and you will be taken back into PantherExpress. A pop up window will have appeared.

8. Enter a note for the selected approver.

9. Click on the Forward button to send the PR(s).
Approving Orders in PantherExpress – Assigning a Substitute

**NOTE:** Please contact the PantherExpress Team at least 2 days in advance in order to Assign a Substitute for your area. PantherExpress@cfo.pitt.edu

Assigning a Substitute can be very useful in the event that an Approver is absent for an extended period of time or on vacation and does not have access to the application. This function allows an Approver to designate another approver as their substitute. Substitutes are able to review documents routed to the original approver.

**NOTE:** Substitutes can be assigned to any folder to which the original user has access.

**EXAMPLE:** Approver Smith of the Department of Psychology is going on vacation and is going to assign two of his department PantherExpress approvers as his substitutes. Judy Miller is responsible for orders between $0 up to $500, and Jake Hart is responsible for orders between $500.01 up to $5000.

Judy Miller will now see the Department folder for orders between $0 up to $500 in her Review pane on the PantherExpress Home Page.

Likewise, Jake Hart will now see the Department folder for orders between $500.01 up to $5000 in his Review pane.

1. Navigate to the Approvals Page, and click on **Assign Substitute Approvers**.

   PantherExpress
   N → Home → Orders & Documents → Approvals → Assign Substitute Approvers

2. If you are an Approver with different approval folders, choose the folder(s) that you will assign a substitute to.

3. Click on **Assign**, or put a checkmark into the designated approval folder(s), and choose the **Assign Substitute to Selected Folders** from the available action menu, and click on **Go**.

   - A substitute can also be assigned to all folders. This link is located on the upper right-hand side above the folders.
4. Enter in the last name of the user who will be assigned as the substitute.
5. Click on the preferred user.
6. The Substitute’s name will appear in the Folder Name in the Substitute section.
7. To end a substitution assignment click on the Remove box next to designated approval folder to end a substitution for an individual approval level, or click on the End substitution for all folders box to end a substitution for all approval levels.

**Note:** You are also able to schedule your substitute assignment for a particular period of time by adding a start and end date to your substitute assignment.
**Approving Orders in PantherExpress – Checking the Status**

Check the status of the orders as a Department Buyer.

1. Logout as the Approver.
2. Log in as the Department Buyer again.
3. Navigate to *Orders & Documents, Search Documents*.
4. Click on *My Requisitions*.
   - Look over the status of your requisitions.
   - Take note of the icons under *Status*.

Here are some of the possible status icons you may see under *My Requisitions*:

- Requisition Approved
- Requisition Pending Approval
- Requisition Rejected
- Requisition Withdrawn
- Pending, but line item(s) Rejected
- Approved, but line item(s) Rejected

5. Now navigate back to *Orders & Documents, Search Documents* and click on *My Purchase Orders*.
   - What are the differences between this view and the requisitions view?
   - Has the *Workflow Status* been completed?

Listed below are the various icons users may encounter under the *Workflow Status* in *My Purchase Orders*:

- Status Requires Attention
- Approved Purchase Order
- Purchase Order Pending Approval
- Rejected Purchase Order
- Pending, but line item(s) Rejected
- Approved, but line item(s) Rejected

**Note:** Be aware that you will not be able to view/check the status of a requisition that you did not place yourself. If you are an Account Assigner, you will be able to access any requisition to which you assigned an account number. Likewise, an Approver can view any order he/she has taken action on. For broader access, you must request Department View access from the PantherExpress Department.
**Approving Orders in PantherExpress – Checking the Status**

View a note on a rejected order:

1. Navigate to Orders & Documents, Search Documents, and click on My Requisitions.

2. Click on the requisition # of the order that has been rejected.

3. Once the requisition is opened up, click on the History or the Comments tab.

4. Notice in this example the line items were rejected by the approver because the items were no longer needed.
**Approving Orders in PantherExpress – Search for Approvals**

**View all orders Approved by you:**

You can review all orders Approved by performing a “Document Search”:

1. Navigate to Orders & Documents, Search Documents.
2. Choose the document type you want to view.
3. Click on “advanced search”.

4. Type in your username or last name in the “Approved By” box.

*As you type in your name, a list may propagate from which you can select your name.*

5. Click on **Go** to complete your search.

*Note: the instructions are the same when looking for Purchase Orders and Invoices.*
Approving Orders in PantherExpress – Helpful Hints

Helpful Hints

- Marking yourself as an approver on the user Profile Form does not grant you access to approve orders in your department. You also need to complete the Department Approval form and submit it to PantherExpress System Solutions.
- If your approver is going on vacation, make sure she/he assigns a substitute approver.
- Your order will go into the Department Approval Catch-All folder if your department has not assigned approvers to the account code you are using for your order. Approvers can assign orders in the catch-all folder to themselves, which moves the orders into their personal requisition folder from which they can take action on the orders.