Approver Quick Reference Guide

Accessing PantherExpress
Login to my.pitt.edu and click the PantherExpress link.

PantherExpress Approvals:
- All orders over $10,000 will automatically route to Purchasing Services for review and approval, after receiving departmental approval.
- Approvers are notified via email when a document has been routed for their approval.
- Departments can assign an approver to any of the departmental approval folders.
- These steps apply to approving requisitions, change requests, or specialty forms

Review Order History by Department
Departmental approvers, with the appropriate permissions, are able to not only see the history of orders they reviewed, but all other orders placed within their department.
1. Access Orders – Search Documents

Search Across all Document Types
7. Access Orders – Search Documents
8. Choose All Documents as the search option.
9. Enter search criteria such as requisition, purchase order, or invoice number, supplier or cart name, etc., and click Go.
10. View your search results.

Assigning Orders to Yourself
Note: to take action on an order you must first assign the order to yourself.
1. Go to Orders – Approvals menu.
2. Select Requisitions, Purchase Orders, Change Requests or Procurement Requests to Approve.

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3. The folders you have access to will be displayed. Select the folder to see the contents. Select the order(s) to review by clicking the Assign button, or for multiple orders click the appropriate checkboxes, and select Assign from the dropdown menu and click Go.

Use the Advanced Search option for more detailed search functionalities, e.g., Owner, Total Amount, Supplier, Catalog #, Account No., etc.
4. The requisitions will automatically move to the My PR Approvals folder. Click on the folder name to view the requisitions.

Modify an Order
1. Once you have assigned the transaction to yourself, click on the requisition number to view the contents of the order.
2. Edit the order (e.g., Ship-to location, Quantity, Account Number).
3. Save your changes.
4. Scroll to the top of the page and select Approve/Complete Step from the Available Actions dropdown menu and click Go.

Approve an Order
1. Click on the requisition number in the My PR Approvals folder to view the contents of the order.
2. Scroll to the top of the page and select Approve/Complete Step from the Available Actions dropdown menu and click Go.

Reject an Order or a Line Item in an Order
Note: Rejected orders cannot be modified. If you would like the buyer to modify the order (account number, quantities, etc.), and resubmit the order for approval, then use the Return to Requisitioner option.

1. Click on the requisition number to view the contents of the order.
2. Select each item to reject by clicking on the checkbox at the end of the line item.
3. Scroll up to the Supplier/Line Item Details area.
4. Select Reject Selected Items from the dropdown menu and click Go.
5. In the pop-up window, enter a reason for rejecting the order.
6. Scroll up to the Approve/Complete Step and click Go.
7. Note: You cannot reject individual line items on a Punch-out order. All lines must be rejected, and a new order can be created for the "good" line items.

Forward an Approval
This function is provided so that a requisition can be forwarded to a different approver for review, if needed.
1. From the My PR Approvals folder, or once the requisition is open for review, select Forward To from the dropdown menu, and click Go.
2. Enter the last name of the person to forward to and click Search.
3. Select the correct user.
4. Enter a note for the selected approver.
5. Click Forward to send the requisition(s).

Assign a Substitute Approver
In the event an approver is absent or does not have access to the application, they can designate another approver as their substitute for Requisitions, Purchase Orders, Change Requests, and Procurement Requests. The substitute is able to review documents routed to the original approver.

1. Navigate to Orders – Approvals, then select the document type.
2. You will now see your approval folders. Enter a check mark on the right hand side for the folders for which you would like to set up a substitute approver.
3. Click the Substitute Actions menu and select Assign Substitute to Selected Folders. You can also assign all folders by selecting the Assign Substitute to All Requisitions Folders button.
4. Search in the Substitute Name field to find the name of the person acting as the substitute. Optionally, enter a Start and End Date.
5. Click the Assign button.
6. Click Remove, to end the substitution setting for a folder, or click on the End Substitute for All Requisition Folders from the dropdown.

To Get Help
Contact PantherExpress Customer Service at 412-624-3578