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Requisition and Purchase Order Approver

Before an order can be completed, it must go through an approval process. In this process, requisitions may be assigned to one or more approvers via steps in the workflow process. Approvers review the document and approve or reject line items, or the order as a whole. To approve requisitions, you must have the appropriate approval permissions. Permissions are granted through role assignment or individual permissions being granted by a system administrator.

Workflow

The workflow process begins when a cart is submitted and continues through the point the purchase order is sent to the supplier. The goal of the workflow is to make sure that all orders sent out are reviewed by the appropriate individuals (approvers) prior to going to a supplier. For example, workflow may involve financial approvals. In other cases, it may verify that the certain types of items (such as radioactive or other hazardous items) are reviewed by the appropriate departments at the University, or that an authorized supervisor reviews a transaction prior to completion.

Requisition and Purchase Order Approval Basics

- The term approver is used to describe someone who is responsible for reviewing and evaluating purchase orders and purchase requisitions. The term approver is also used to describe someone who has the ability to view departmental or organization-wide order history. Approvers consist of departmental approvers, buyers, and more.
- Assigning a user approver permissions will not automatically allow the user to perform approval-related tasks. Before an approver can perform approval-related tasks, they must be assigned to the appropriate shared workflow folder, be set up as a financial approver, or be designated as an ad-hoc approver.
- Approvers can choose whether or not to receive notification when an order requiring approval lands in their “queue.” This is set up via the user’s profile.
- An entire requisition or purchase order can be approved or one or more line items can be rejected. If part of a document is rejected (one or more line items), the remaining line items continue in the process.
  
  **Note:** Purchase orders cannot be changed directly. A change request must be created for the purchase order. If the change request is approved, the changes will be applied to the purchase order.
- Comments and attachments can be sent “back and forth” between requisitioners, purchase order owners and approvers during the approval process.
• If a line item or the entire document is rejected (by an individual or the system), the rejection notice will show up in document History. If the user is set up to receive notifications for rejections, they will receive an email also. This email contains the rejection note entered by the approver.

• Some types of approval are directed at a single individual and no one else can approve the order (unless a substitute is set up or the order forwarded). Examples of this are for financial approvals or “reports to” approvals.

• Other approval queues can be assigned to multiple approvers. As an organization or department, you can determine how the approvals are handled. For example, you may have a primary approver and someone else may be assigned as a back-up approver OR two people can be assigned to the queue and each individual “takes” orders as their schedule allows. Examples of this type of setup include shared workflow folders, form approval, and more.

• Ad-hoc approvers: users who are approving a purchase requisition can send it to another user for approval. The person selected as an ad-hoc approver can review and approve requisitions before it continues to the next step in the approval workflow.
Accessing Requisitions and Purchase Orders

Approvals Dashboard

After you logged in to the PantherExpress System, the Home page will load. Select the Approvals Dashboard.

The Approvals Dashboard will load.
The Approvals Dashboard was designed to provide a PantherExpress System approver all the information associated with their approval responsibilities in one location.

On the left-hand side of the dashboard you’ll find the **Action Items** window. This window will display Requisition approvals, Purchase Order approvals, and if you have the correct permissions, you’ll see invoice approvals, and change request approvals. The **Action Items** window is a quick and easy way to view the approvals that you can access. Clicking on any of the links in this area will take you to the associated pending approval folders.

In the center of the approvers dashboard you’ll see the **Approvals** window. This area provides you with an easy way to view more details related to your approvals.

From the drop downs in this window, you can filter on Requisition, Purchase Order, Invoice, or Form Request approvals. The Approvals window allows you to view only your approvals, but if you have access to additional Department of approvals, it will allow you to sort on all the approvals you can see. You can group the approvals by folder, or you can leave the approvals just listed in numeric order.
On the right-hand side of the approvals dashboard you’ll see the **Quick Links** and **Helpful Links** windows. These windows are designed to provide approvers with frequently used resources. One of the most frequent requests received is access to the department approval form or the department buyer form.

Approvers can go to the quick links window and click on any of the links listed to take them to the needed resources. There’s a direct link to the department approval form, the department buyer user form, and there’s also a link to the **How to Become a PantherExpress System User** information on the PantherExpress website. You will also see a link to the auto closing for invoice Purchase Order’s tutorial. These resources are the most frequently requested by system users.
Orders Main Menu

Alternatively, you can reach your approvals from the Orders Main menu. Here you will see a list of predefined options, to guide you to your approval.

Selecting any option above will take you to the relevant Approvals page.

The My Approvals page

You must Assign a Requisition or Purchase order to yourself in order to make changes to the document prior to approving the document, and to have it appear in the My Approvals folder. Approval activity is done from the My Approvals screen. From this screen you can access and approve all documents that require your approval.
Folder Vs. List View

There are two different view options for My Approvals screen.

The **Folder** view groups the documents by Approval folder. Select Expand/Collapse All, or the arrowhead before each folder to view the contents.

The **List** view displays all documents in a list format. By default, the list will be sorted by date/time but there are several sorting options including document number and document title.
From either view, you can choose to hide or show document details on the page. Also, use the filters on the left panel.
Document Types

The My Approvals screen allows you to display documents for approval based on document type (Requisition, Purchase Order, Invoice, and more).

The Type drop down list allows you to select the type of documents you would like to display on the My Approvals screen.

Filters

Filters are available to help you narrow down the list of documents that are available for approval. You can refine the documents displayed by date range.

You can also select to view documents that are assigned to other approvers.
Available Actions

There are several actions you can take directly from the My Approvals screen:

The Action Button - A document may have an action button in the Action column. Generally, if the document is in your personal approvals folder, the button will default to Approve. You can click the button to approve the document.

If the document is in another folder, but is eligible to be assigned to you, the button will default to Assign. You can click the button to assign the document to yourself for approval.

The Action Menu - The action menu allows you to perform an action on one or more documents. Available options include Assign, Approve, Forward, and more.
Document Review Details.

- When a document is in your personal folder (My PR Approvals, My PO Approvals, etc. depending on which document type you are displaying), you as the approver own it. Only an administrator can move a document out of this folder. When an order is moved from a shared folder to another user's folder, the approver is indicated to all users who view the shared folder.

- **Shared workflow folders** are folders that can be accessed by one or more approvers. In some cases, there will only be one approver per folder, but more can be set up if needed. The actual folders that display for an approver is dependent on what they are responsible for approving. Therefore, an approver might see one, two, or twenty folders.

- Click the document number to open and view the document.
• To move multiple documents to your my Approvals folder, from the shared folders, click the Select checkbox to the right of each document, then select Assign in the drop-down box.

• The sort order for documents is remembered when an approver leaves the screen and returns. This affects all workflow queues that the user has access to. For example, if you are responsible for approving orders for three different account codes, you might choose to sort them by department. The next time you log in to approve an order, your sort preference will be remembered.
Approving a Requisition and Purchase Order

You must Assign a Requisition or Purchase order to yourself in order to make changes to the document prior to approving the document. Once the document is assigned to you, you can directly approve it from the My Approvals page. In the My Approvals folder locate the document(s) you would like to approve. A document will only appear in the My Approvals folder if it is assigned to you.

Select Approve in the Action column.

If the document was correctly filled out, it will be approved and will be removed from the list. If the document is missing some information, you will receive an error:
To correct the document, open it by selecting the document number.

Review the document, if there are errors, make corrections, then select the Available Actions and take action.
If there are no errors, select the Available Actions and take action.