PantherExpress

PantherExpress System

Department Buyer Training

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Introduction

The PantherExpress System is a web-based procurement and payment request tool that links authorized University of Pittsburgh purchasers to suppliers. The University uses this system to streamline the process of purchasing goods and services and requesting payments.

Purchase, Pay & Travel Departments

Purchase, Pay & Travel manages the University's buy-to-pay process and is comprised of the following departments:

Strategic Sourcing and PantherExpress System Solutions

Strategic Sourcing and PantherExpress System Solutions identifies and manages opportunities for University-wide savings on purchased goods and services as well as managing the PantherExpress System for e-procurement and invoice processing. PantherExpress is all-inclusive one-stop shopping experience for purchasers.

Purchasing Services

- Purchasing Services manages University-wide contracts and University Travel, promotes leveraging University-wide agreements for cost savings, assists with unique purchasing needs (over $50k), and is committed to increasing the use of Diversity Suppliers as well as environmentally preferable purchase options. Purchasing Services includes the following roles:
- Procurement Specialists
- Senior Buyers
- Supplier Diversity & Sustainability Coordinator

Read more about their Sustainability and Diversity Initiatives.

Payment Processing and Compliance

Payment Processing and Compliance is committed to paying suppliers accurately and within agreed upon terms; ensuring compliance with federal, state, and local laws; and implementing a system of sound internal controls to monitor compliance.

Customer Service

Customer Service provides our customers with a one-stop shop help desk for your purchasing and payment questions. The staff of the Customer Service Department consists of operators and a manager who will answer your question as quickly and efficiently as possible. You can reach Customer Service here.

University Cards

University Travel Card

The University Travel Card is the preferred payment method for travel bookings, purchases in travel status, and for business entertainment expenses that cannot be purchased through the PantherExpress System. Conference registrations, memberships and dues, and travel purchases should be made only on the University Travel Card.

Learn more about the University Travel Card here.

P-card

The PantherExpress System is the recommended method to purchase most routine goods and services for the University. A PantherExpress Purchase Order or Services Agreement provides the best contractual terms and conditions to protect your department, and it simplifies accounting and purchase record-keeping.

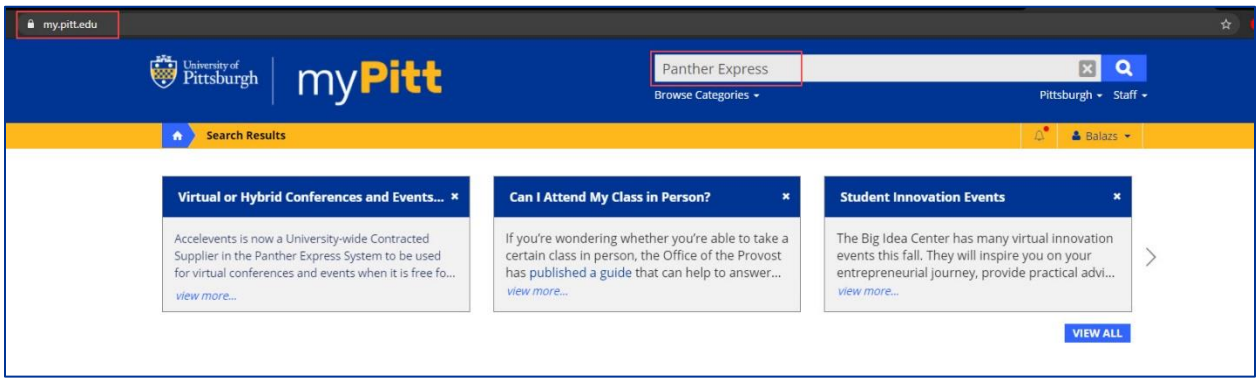
The University also offers a P-card as a convenient supplemental purchase method for emergency purchases. A P-card is an institutional purchasing VISA credit card administered through PNC Bank. For more information about P-card use and examples of prohibited purchases, please review *Policy 05-02-12, Procurement Card.*

Learn more about the P-card here.

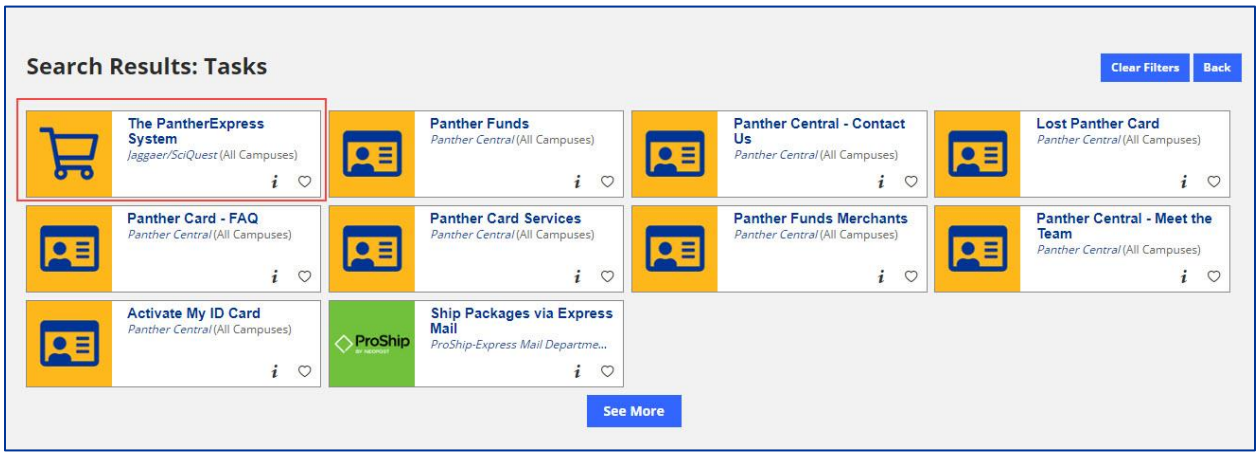
Navigating to the PantherExpress System

Login

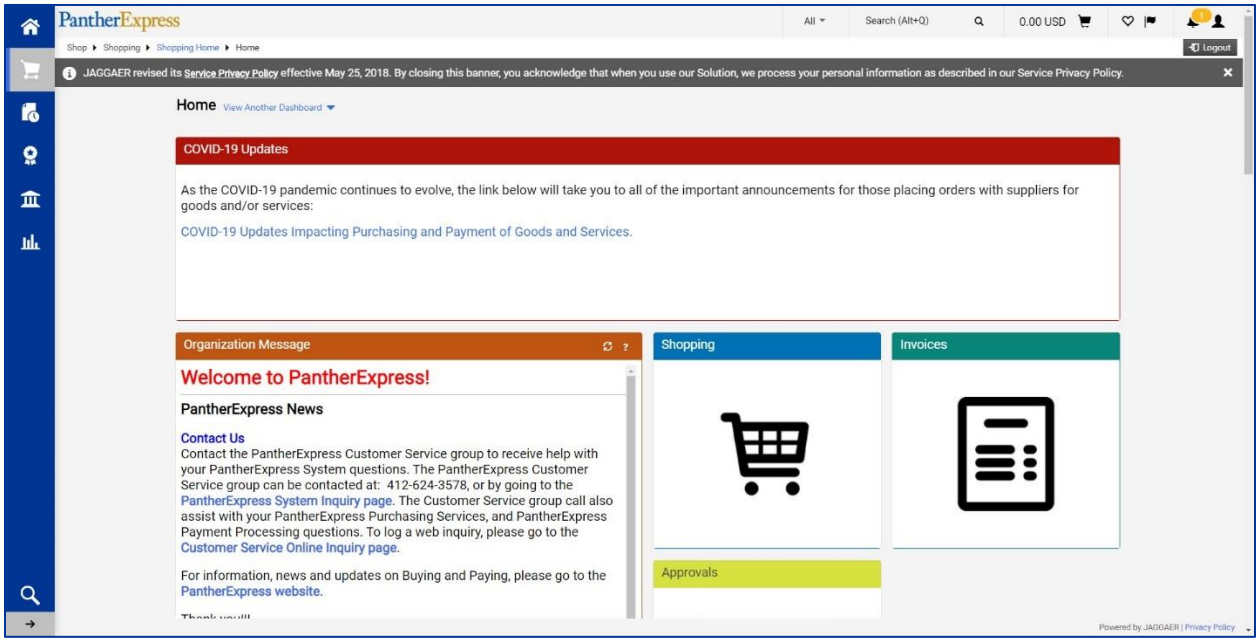
Navigate to the https://my.pitt.edu/ page in the browser of your choice. Once authenticated, search for Panther Express in the search bar.



From the result, select the PantherExpress System link. NOTE: You must be a registered PantherExpress user in order to be able to access the software.



Depending on your browser, you may need to authenticate once more, after which the homepage will be displayed.

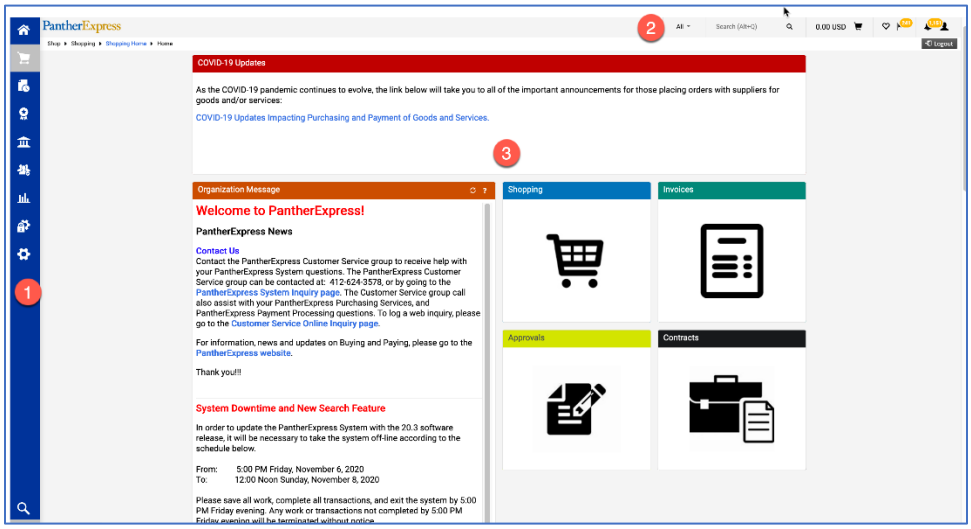


Home Page

The user interface is designed to provide a clean, intuitive user experience. The site is easy to navigate and provides several features to help you locate and manage your tasks. The menu items and features displayed are dependent on your role, and your permissions.

The PantherExpress System home page contains three major areas. Below you will see the element of the Home Page navigation.

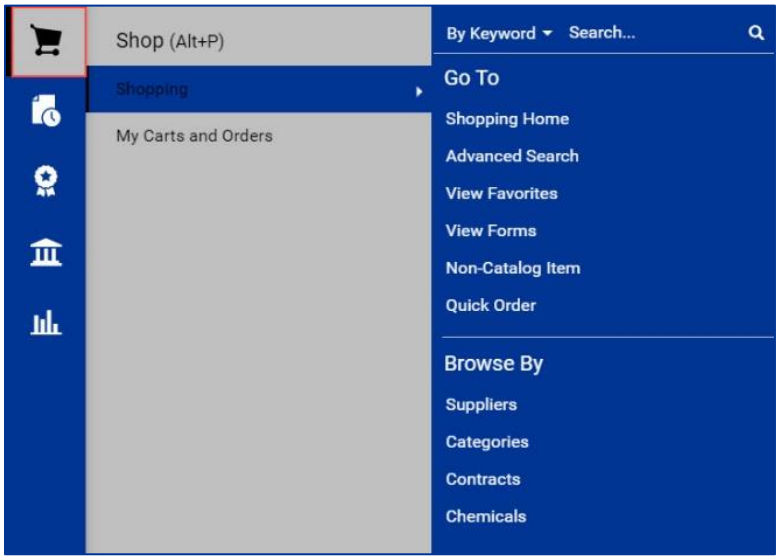
1. Main Menu
2. The top Navigation
3. Dashboards



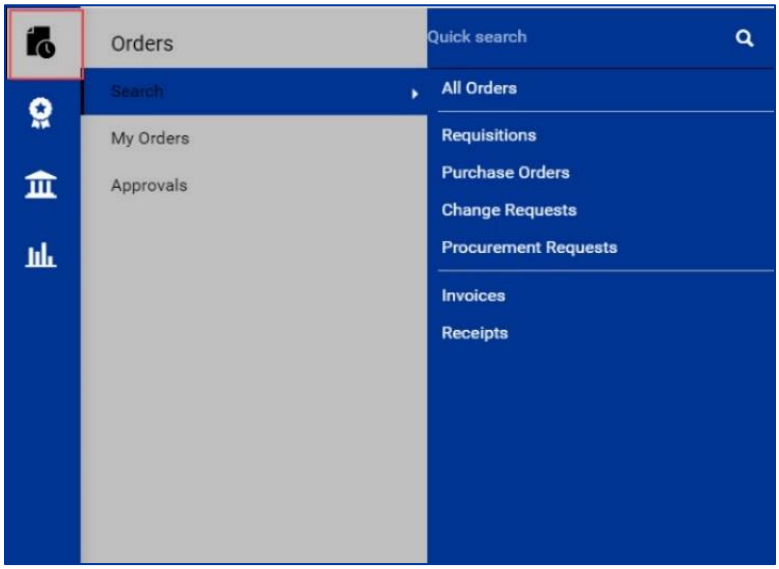
Main Menu options

The menu bar on the left consists of the following elements. Note, that depending on your access, the number of options may differ. Each menu option contains several sub-menus.

- Shop, where you can access the search, favorites and your Carts.



- Orders, where you can Search for orders and review your Orders and Approvals.



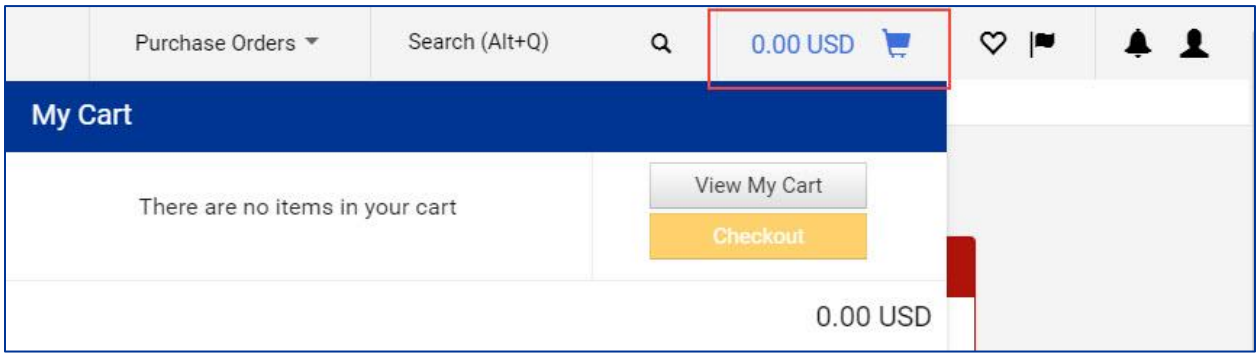
- The other Menu items are currently not in use.

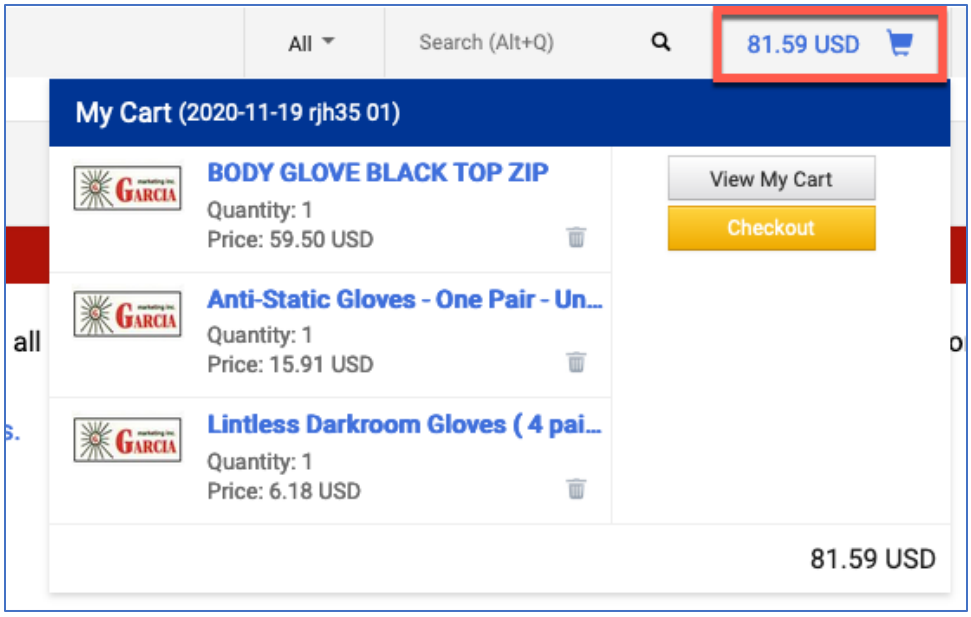
Top Navigation

The Navigation row contains the following elements:

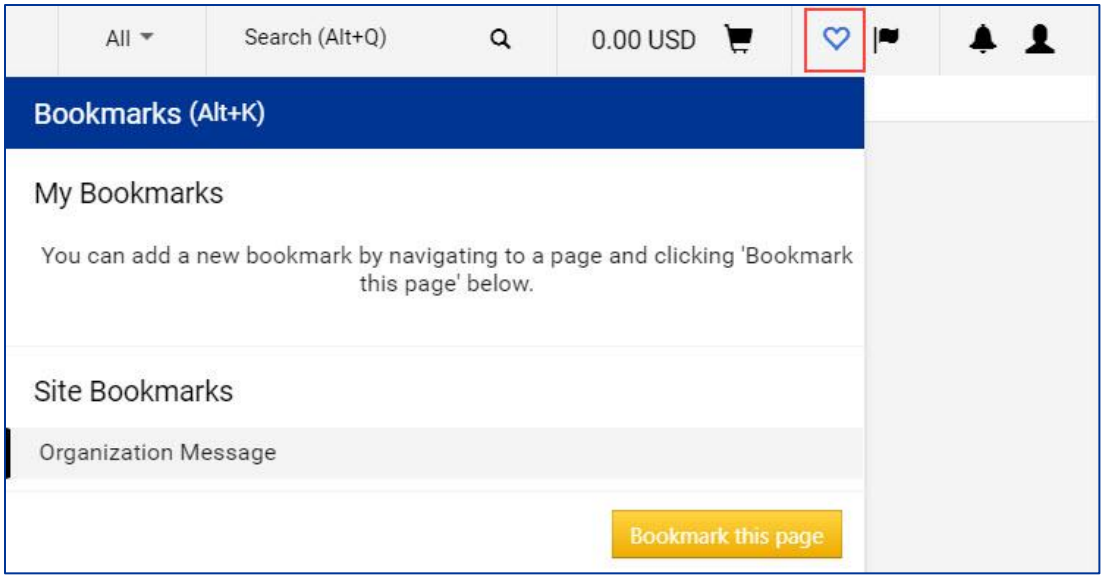
- Quick Search, made up of the All dropdown and Search, where you can select the items to search based on the parameters entered in the Search.

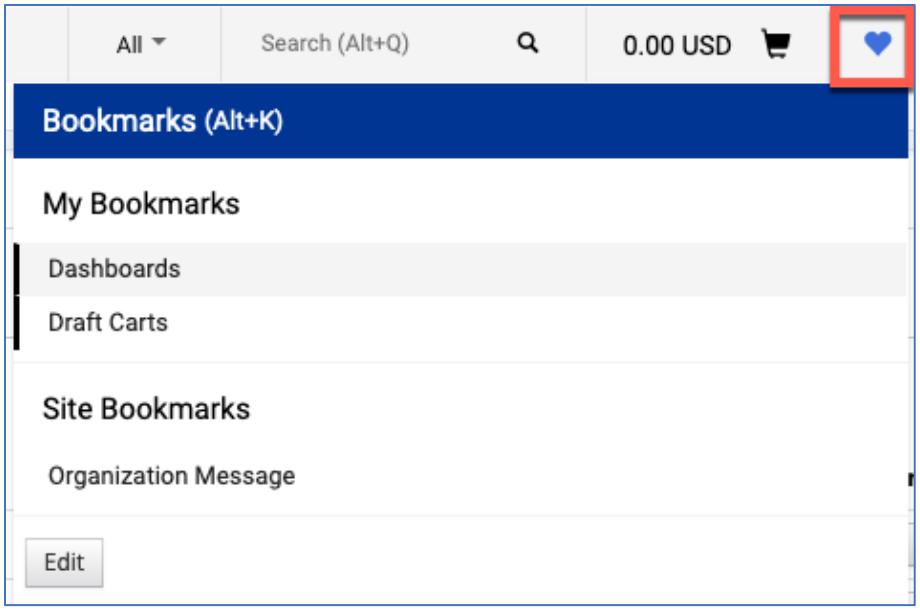
- Cart Preview, which allows you to get a quick view of the active shopping cart without having to access the cart in the application. From the Cart Preview you can review the item list, delete an item from the cart and access the active cart. Clicking on the shopping cart icon will display the item list with basic information such as item image, name, quantity and price. From the cart preview you can remove items, access the active cart and/or proceed to checkout.





- Bookmarks, allowing you to save commonly used pages as bookmarks for quick access. You can create and access bookmarks from this menu.

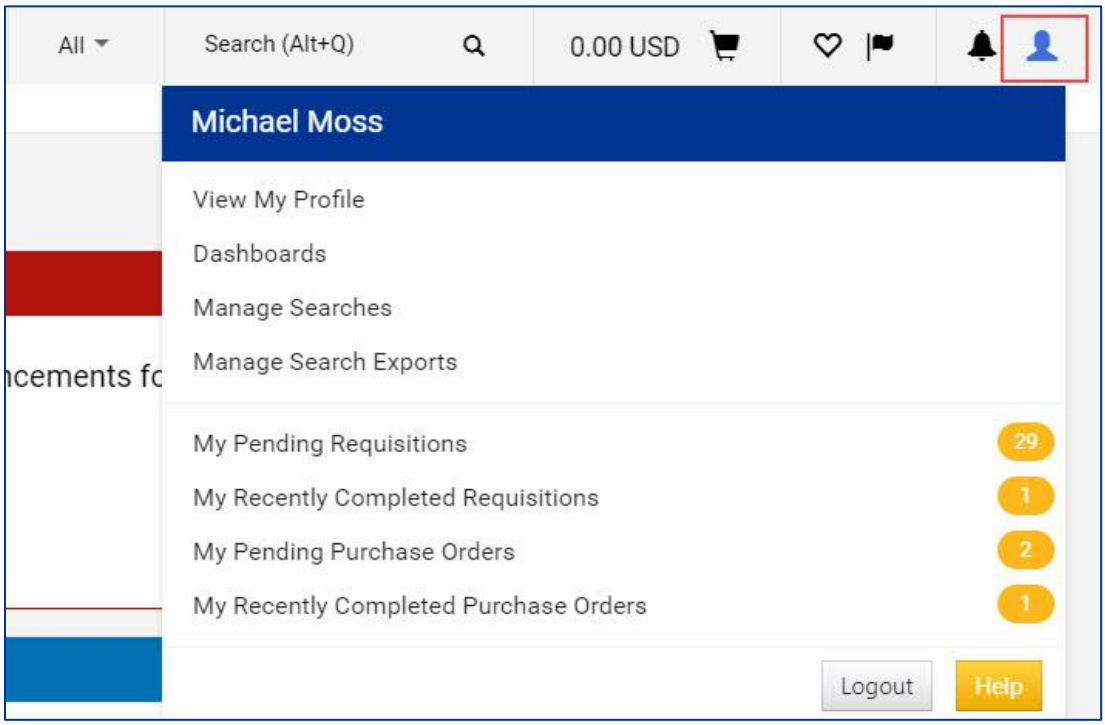




- Action Items, tasks that require some action on your part. The Action Items list displays all action items assigned to you. The number of action items is indicated to the right of the menu. Action items are grouped together by task. Clicking on the task group takes you to the appropriate area of the System to complete the action items.

- Notifications designed to alert you when an activity has taken place, or something requires your attention. Some Notifications will also be sent by email, but several of them can be accessed from the Notifications menu. The number of notifications is indicated to the right of the menu. Notifications are sorted by notification type and newer notifications are highlighted.

- Profile, where you can access your Profile information, Dashboards and saved searches. You can also find quick links to your Pending and Completed Requisitions and Purchase Orders.



Dashboards

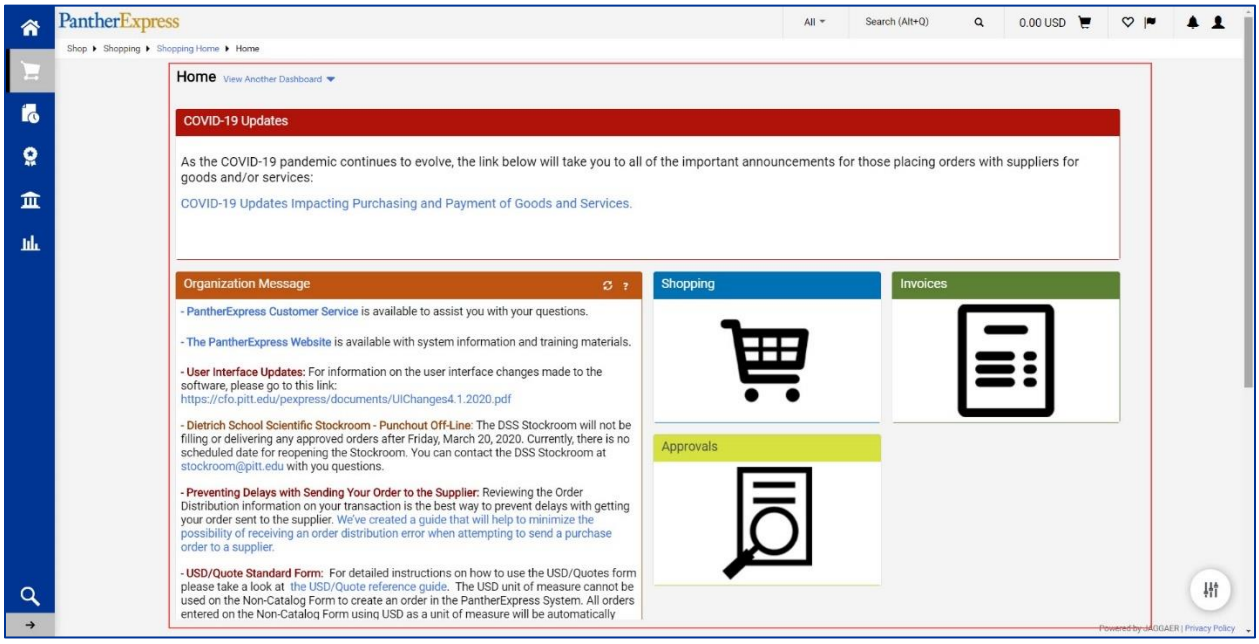
There are five dashboards in the PantherExpress system: The Home, Shopping, Invoices, Approval, and Contracts dashboards. *Depending on your user rights in the system, you will be able to see all or some of the dashboards*. Each of the PantherExpress System dashboards has a specific purpose.

Each dashboard has been color-coded to allow the end-user to quickly and easily see which dashboard is being used. The shopping dashboard is color-coded blue, the invoices dashboard is color-coded green, the approvers dashboard is color-coded yellow, and the contracts dashboard is black.

The Home Dashboard

All system users will be able to view the home dashboard. The home dashboard is meant to be the information center of the software and the launching point to shop, check your invoices, and if you are an approver, view all your pending approvals.

At the time this training material is being developed, the home dashboard in the PantherExpress system shows a COVID-19 update information area at the top of the page. This is intended to guide system users to all relevant information related to the COVID-19 response by the University. The COVID-19 information area will be removed at the appropriate time.



Scroll down the Home dashboard, on the left-hand side, you'll see the organizational message area. The organizational message area is intended to inform the system users of any campus or university purchasing information.

Organization Message

- PantherExpress Customer Service is available to assist you with your questions.

- The PantherExpress Website is available with system information and training materials.

- User Interface Updates: For information on the user interface changes made to the software, please go to this link: https://cfo.pitt.edu/pexpress/documents/UIChanges4.1.2020.pdf

- Dietrich School Scientific Stockroom - Punchout Off-Line: The DSS Stockroom will not be filling or delivering any approved orders after Friday, March 20, 2020. Currently, there is no scheduled date for reopening the Stockroom. You can contact the DSS Stockroom at stockroom@pitt.edu with you questions.

- Preventing Delays with Sending Your Order to the Supplier: Reviewing the Order Distribution information on your transaction is the best way to prevent delays with getting your order sent to the supplier. We've created a guide that will help to minimize the possibility of receiving an order distribution error when attempting to send a purchase order to a supplier.

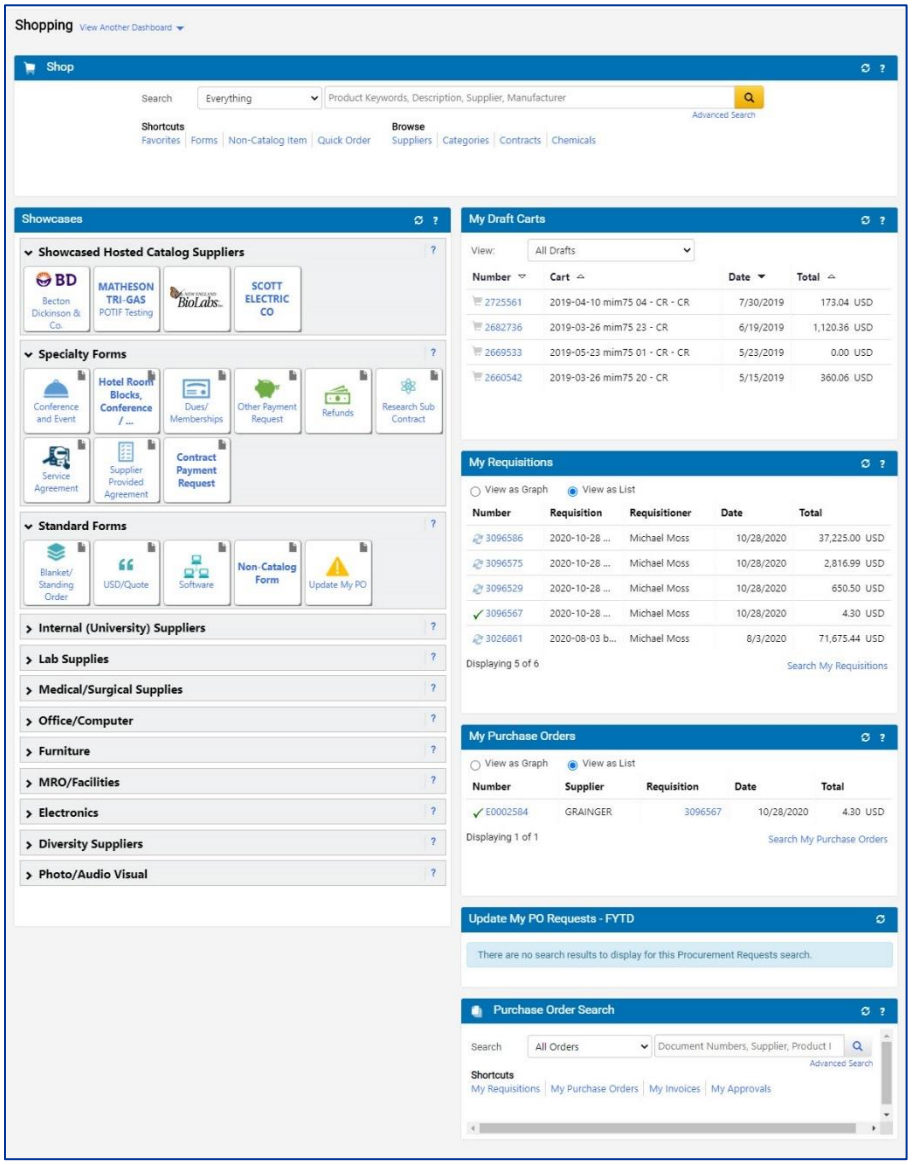
- USD/Quote Standard Form: For detailed instructions on how to use the USD/Quotes form please take a look at the USD/Quote reference guide. The USD unit of measure cannot be used on the Non-Catalog Form to create an order in the PantherExpress System. All orders entered on the Non-Catalog Form using USD as a unit of measure will be automatically returned to the buyer as a draft shopping cart. **If you are entering a line item that will have a quantity of 1, but you expect multiple invoices against that line, use the USD/Quotes form for you transaction.**

- Diversity Supplier Search: For information on purchasing from DBE suppliers, please click Here to visit the PantherExpress web site. To search for diversity suppliers in PRISM, please click Here.

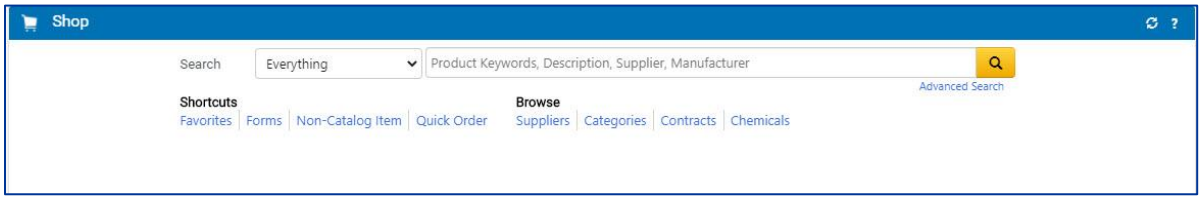
The Shopping Dashboard

To access the Shopping Dashboard, select the Shopping menu on the Home Dashboard.

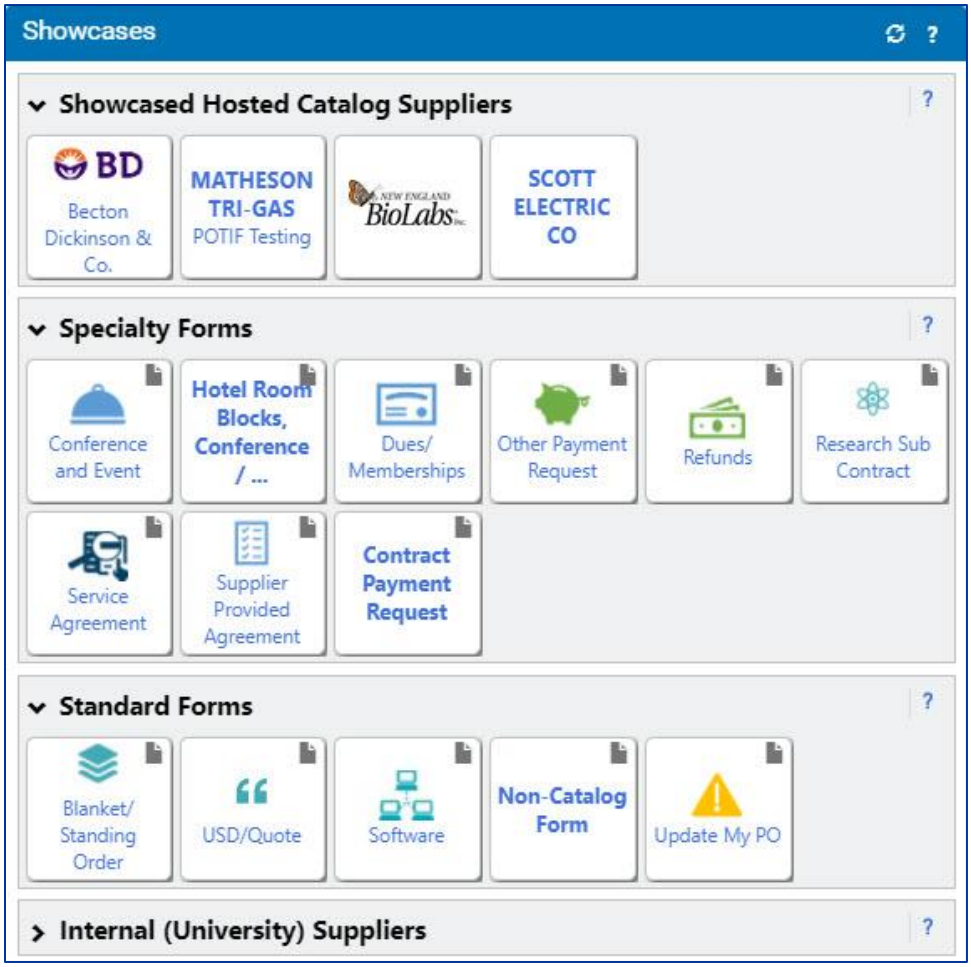
The Shopping Dashboard takes you to purchasing related functionality in the PantherExpress system.



At the very top of the shopping dashboard you will see the shop area. The shop area allows you to search the hosted catalogs that are in the PantherExpress system. In the shop area you will also see shortcuts to favorites, forms, non-catalog item, and quick orders. You are also able to browse suppliers and categories.

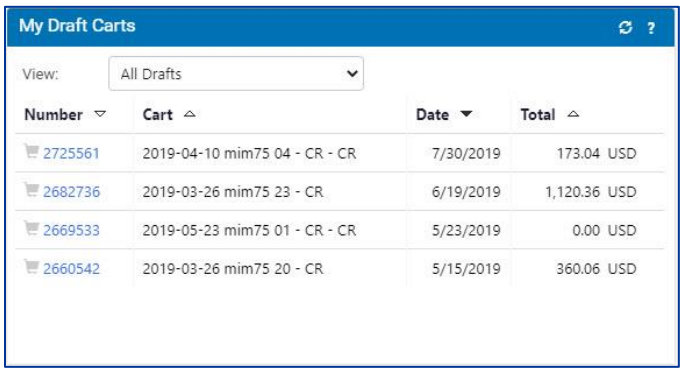


On the Left-hand side of the screen you'll see the Showcases area. This area displays the Specialty forms, Standard forms, our internal suppliers, and the various Punchouts that are available in the system. You can click on any of the icons in this area to open the appropriate form or launch the appropriate Punchout for your purchasing.



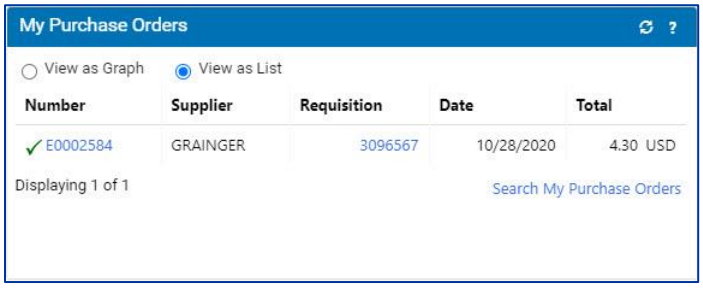
On the right-hand side of the shopping dashboard you'll see the My Draft Carts area. The My Draft Carts area will show all your draft shopping carts. Draft shopping carts consist of orders that you did not complete, and orders that may have been returned to you by an approver. The My Draft Carts area was added to make it easier for you to determine if you have an outstanding order that needs completed, or if an approver has returned a Requisition for you to make changes. You can click on any of the draft carts in the window to access the cart to complete the order or delete the cart.

Note: *It is important to delete or remove draft shopping carts that are no longer needed. This helps to prevent problems with placing unwanted orders or mistakenly adding additional suppliers or items.*

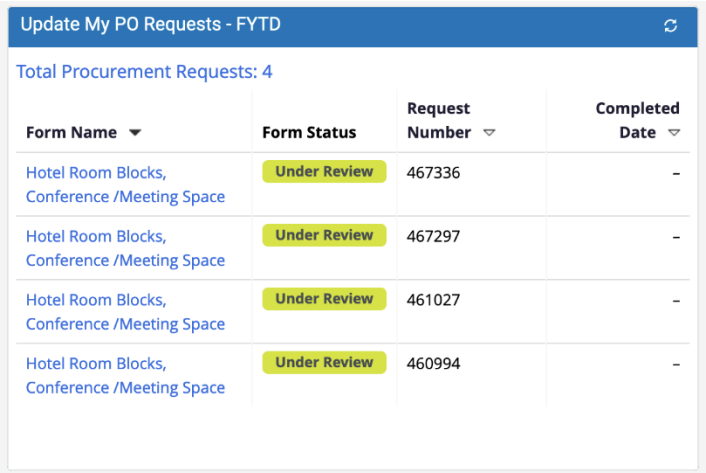


Scrolling down the shopping dashboard, on the right-hand side of the page, you will find the My Requisitions Window. The My Requisitions Window is intended to show you all your current Requisitions entered in the system. This will provide you with a quick and easy way to determine if your Requisition has been completed, or if your Requisition is still pending in the PantherExpress system workflow. If your Requisition is pending you can click on the Requisition number and go to the workflow to see where your order is in the approval process.

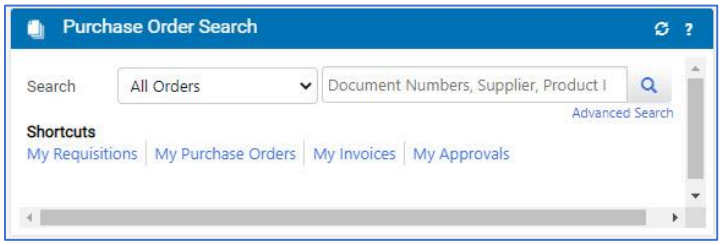
Further down, on the right-hand side of the shopping dashboard, you will find the My Purchase Orders window. My Purchase Orders window will display Purchase Orders created by you in the last 90 days. The My Purchase Orders window is intended to show the status on your most recently placed Purchase Orders. This will allow you to determine if your Purchase Order has been sent to the supplier or if the Purchase Order is awaiting approval in the workflow.



Further down the right-hand side of the shopping dashboard, you'll also find the Update My PO Requests. The Update My PO Requests will show you all of your Update My PO form requests that you placed for the current fiscal year. This will allow you to quickly and easily find the status of your update requests placed in the system. You'll be able to tell if the request has been completed or if your request is still under review.



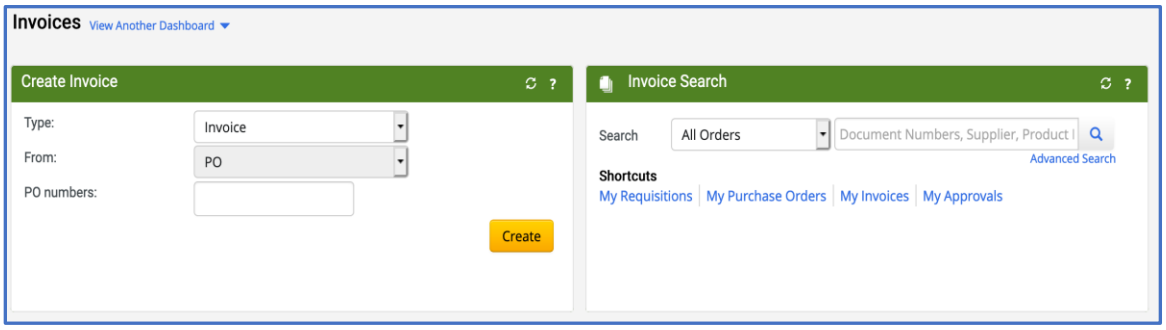
The last window you'll find on the right-hand side of the shopping dashboard is the Purchase Order Search window. If you cannot find the Purchase Order or Requisition information that you need on the shopping dashboard, the Purchase Order search is intended to allow you to quickly and easily search the system for the information needed.



The Invoices Dashboard

The Invoices Dashboard provides you with information specific to the invoices associated with the Purchase Orders that you've placed in the system. If you are a department buyer, you'll be able to see the invoice information associated with your orders. At the very top left-hand of the invoice dashboard, you will find the Create Invoice window. This area allows you to quickly create an invoice for any of the contract related specialty forms that you may have placed in the system.

In the top right-hand corner of the invoices dashboard, you will see the Invoice Search window. The Invoice Search window will allow you to search for invoices associated with any of your Purchase Orders.



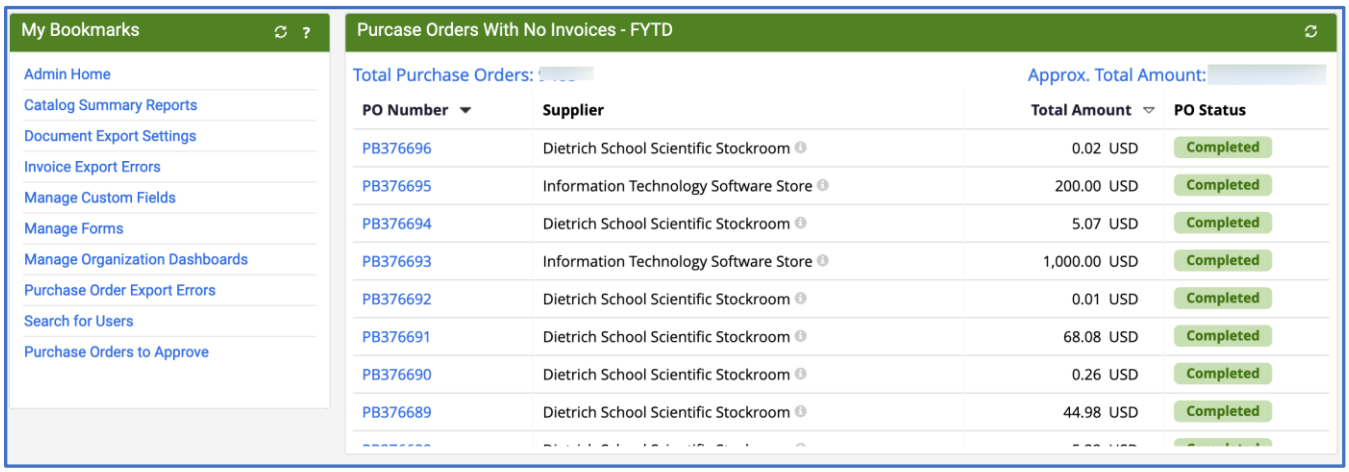
In the middle of the dashboard, you'll find the Paid Invoices window. This window shows all of your Paid Invoices for the current fiscal year to date. If you have permissions to view all invoices in your department the Paid Invoices window will display all the invoices that have been paid in your department fiscal year to date.

The Payable Invoice window shows your invoices currently in payable state in the PantherExpress system. Payable means the invoice has been sent to Oracle for payment, but the actual payment has not been sent to the supplier. When the payment is sent to the supplier, an update will be made to list the invoice as paid. At that time, the invoice will no longer appear in the Payable Invoice window.

Invoice Number	Supplier	Total Amount	Invoice Status	Supplier Invoice Number(s)
98294462	GENEWIZ LLC	100.00 USD	Complete	US80903716012
98294446	GENEWIZ LLC	91.50 USD	Complete	US80903699516
98294426	GENEWIZ LLC	69.00 USD	Complete	US80903699733
98294409	GENEWIZ LLC	34.50 USD	Complete	US80903738107
98294396	GENEWIZ LLC	5.75 USD	Complete	US80903456315

At the bottom of the Invoices dashboard, you will find the My Bookmarks and Purchase Orders with No Invoices windows. The My Bookmarks window displays any bookmark that you've saved in PantherExpress. The screenshot that's included with this tutorial shows the bookmarks that I currently have saved. What is displayed on your screen will be different than what is shown in the screenshot shown.

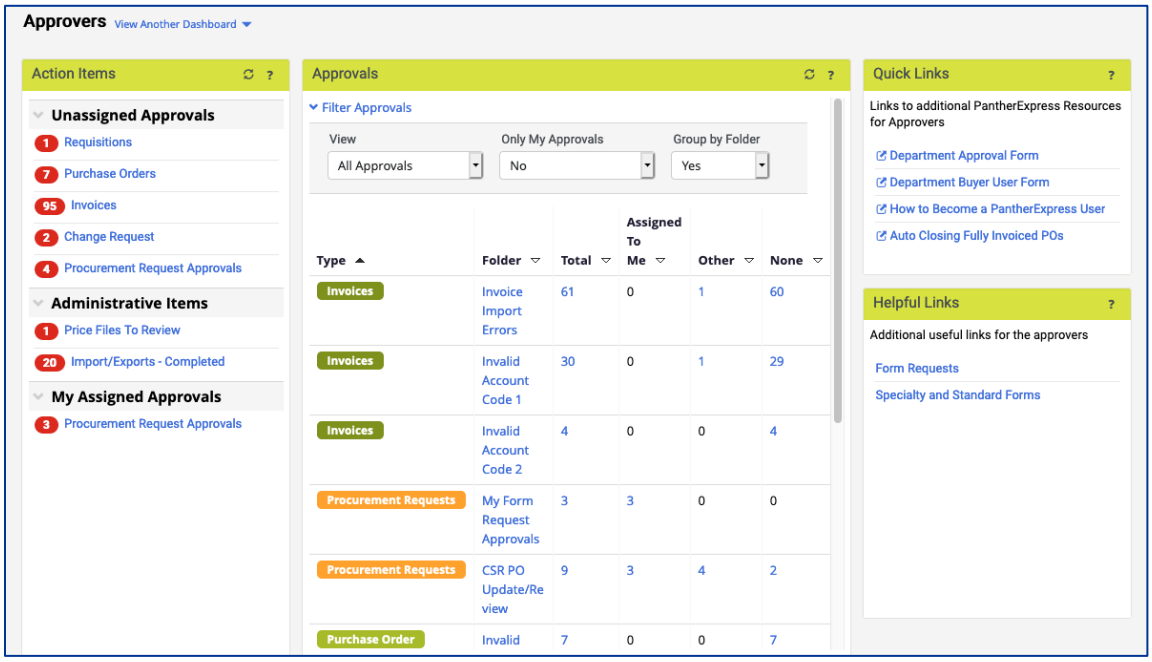
The Purchase Orders with No Invoices window displays any Purchase Order that you placed for the current fiscal year that has not been invoiced by the supplier. Note: if you have purchases from the Dietrich School Stockroom or from the Pitt IT Information Technology Software Store, those Purchase Orders will show up in this window. Orders for the DSS and the Information Technology Software Store are paid via a journal entry. There are no invoices associated with these transactions.



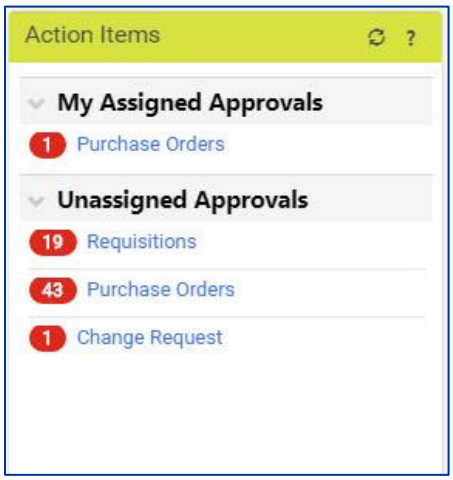
PO Number	Supplier	Total Amount	PO Status
PB376696	Dietrich School Scientific Stockroom	0.02 USD	Completed
PB376695	Information Technology Software Store	200.00 USD	Completed
PB376694	Dietrich School Scientific Stockroom	5.07 USD	Completed
PB376693	Information Technology Software Store	1,000.00 USD	Completed
PB376692	Dietrich School Scientific Stockroom	0.01 USD	Completed
PB376691	Dietrich School Scientific Stockroom	68.08 USD	Completed
PB376690	Dietrich School Scientific Stockroom	0.26 USD	Completed
PB376689	Dietrich School Scientific Stockroom	44.98 USD	Completed

The Approval Dashboard

The Approvers Dashboard was designed to provide a PantherExpress system approver all the information associated with their approval responsibilities in one location.

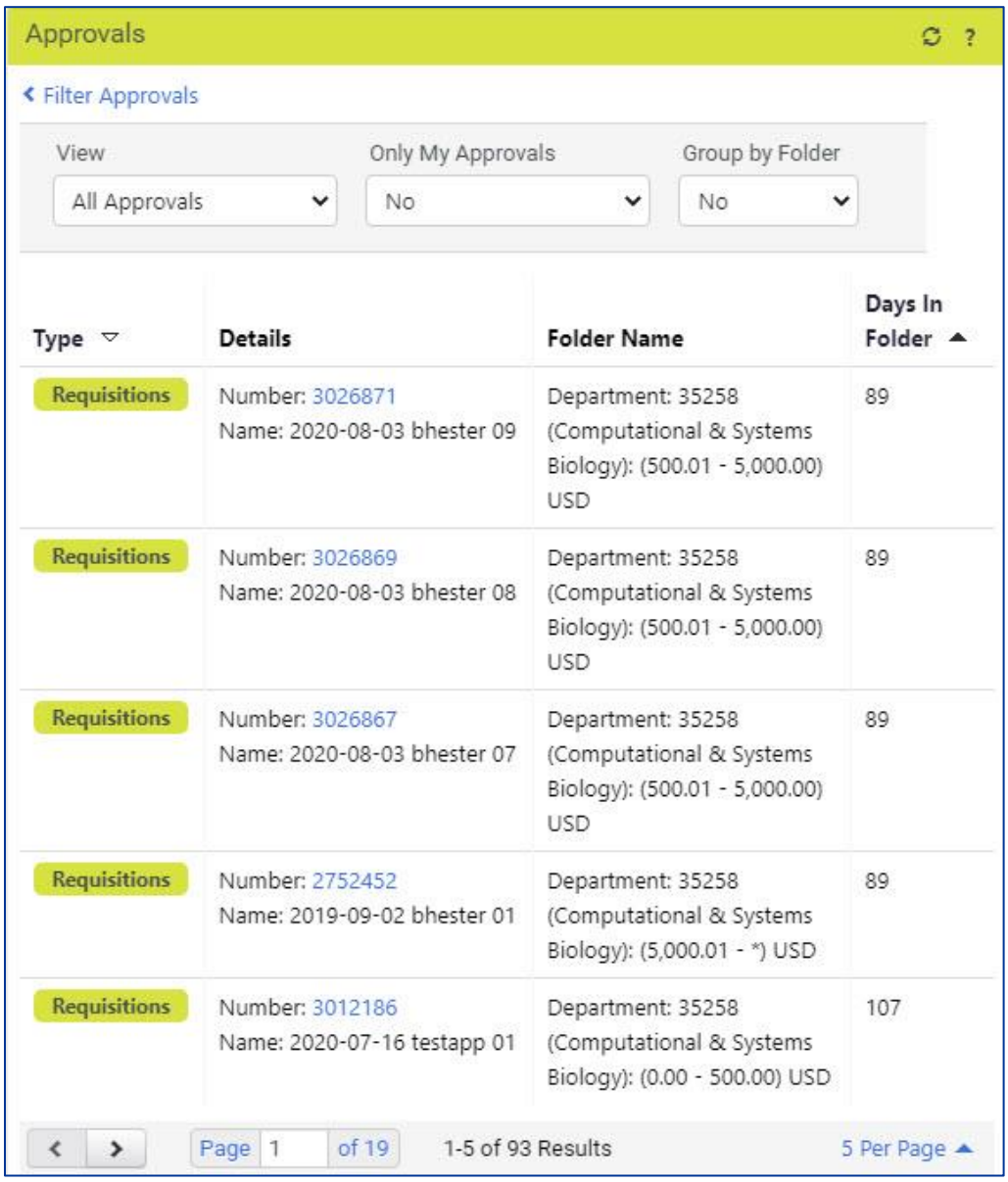


On the left-hand side of the dashboard, you'll find the Action Items window. This window will display Requisition approvals, Purchase Order approvals, and if you have the correct permissions, you'll see invoice approvals, and change request approvals. The Action Items window is a quick and easy way to 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.



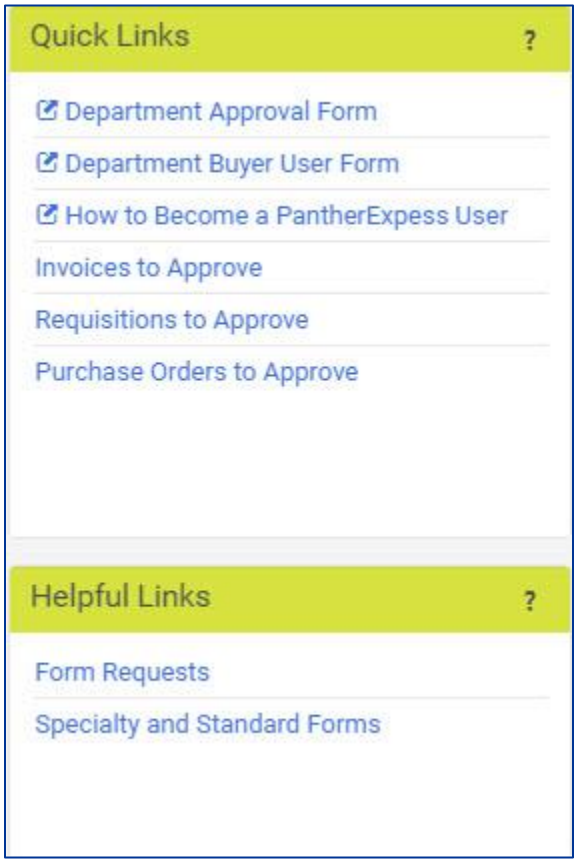
In the center of the Approvers Dashboard, you'll see the Approvals window. This area provides you with an easy way to view approvals you may have had or approvals sitting in any of the various folders that you have access to.

From the drop downs in this window, you can filter on Requisition, Purchase Order, invoice or form request approvals. It also allows you to view only your approvals, and if you have access to additional department 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.



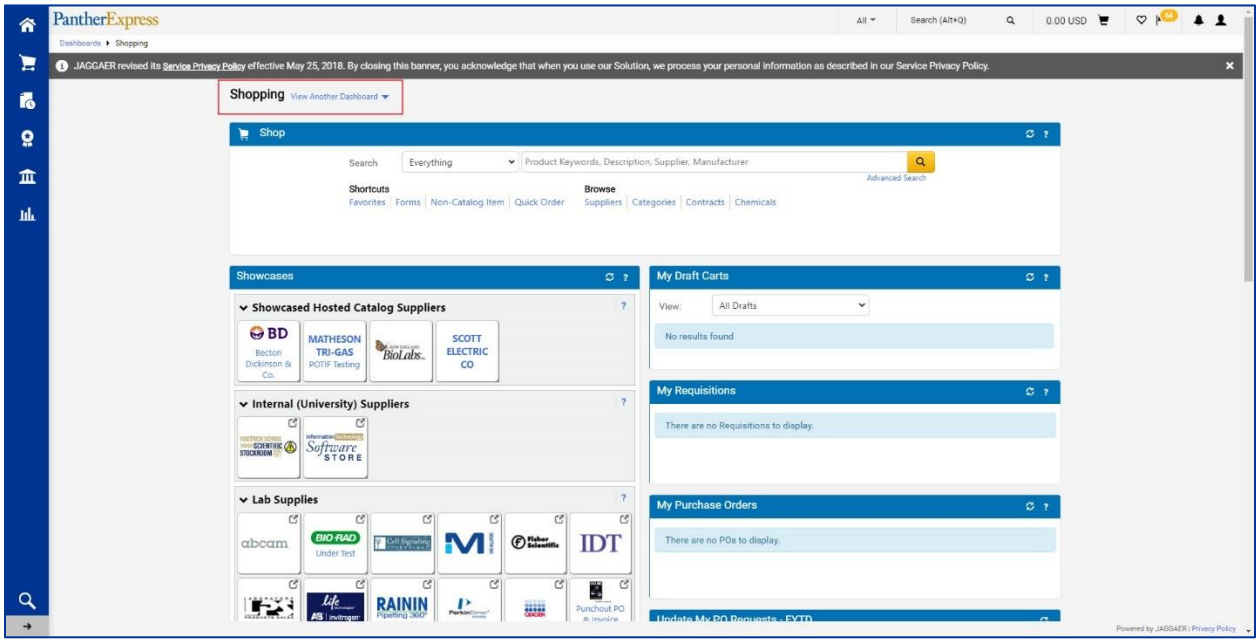
On the right-hand side of the approvals dashboard, you'll see the Quick Links and Helpful Links windows. These windows are designed to provide approvers with frequently used resources.

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 User webpage on the PantherExpress website. You will also see a link to the auto closing fully invoiced Purchase Order's tutorial. These resources are the most frequently requested by system users.



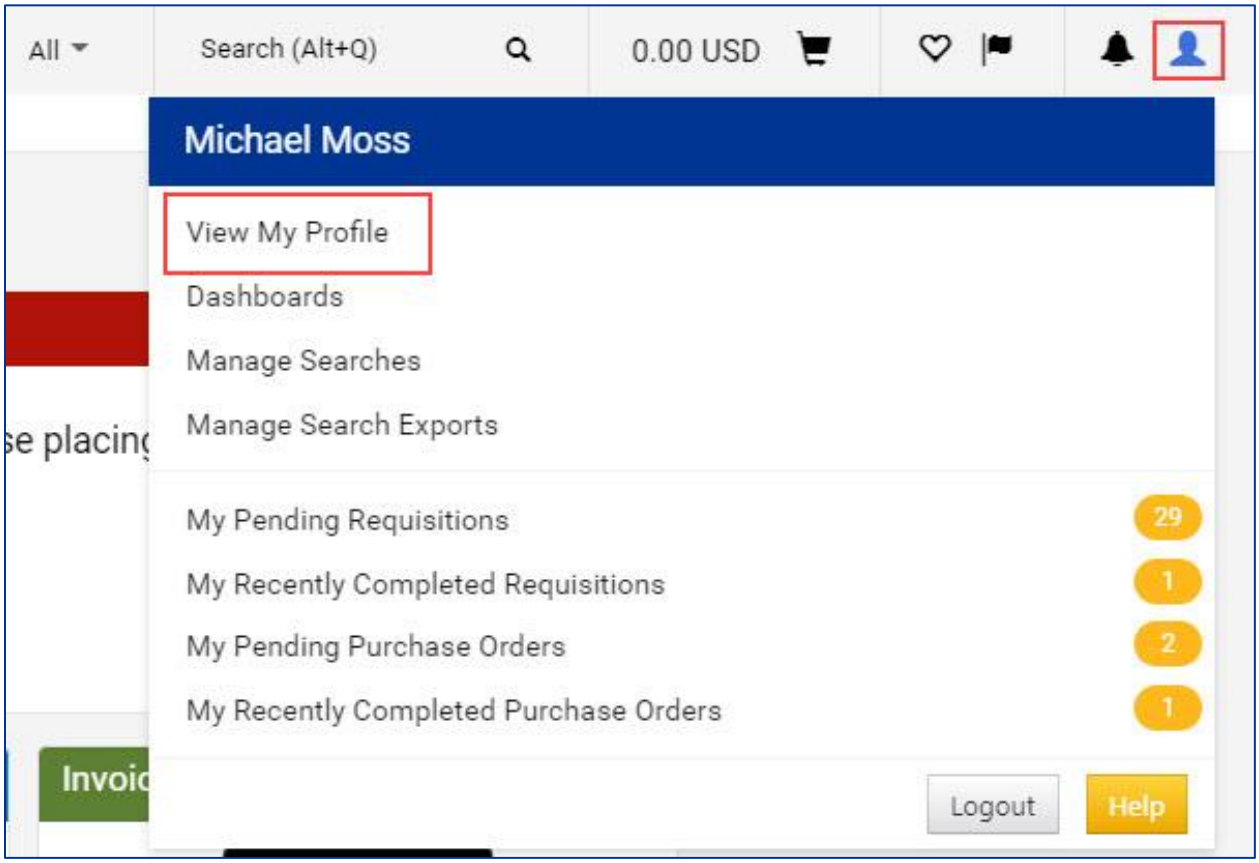
Navigating the Dashboards

At the top of each dashboard, you will find the View Another Dashboard dropdown menu. This dropdown allows you to quickly navigate to one of the other dashboards without the need to return to the Home Dashboard. This provides an easy way to navigate between the dashboards.



Profile Review

You can access your profile by selecting the Profile icon on the Top Navigation menu, then View My Profile.

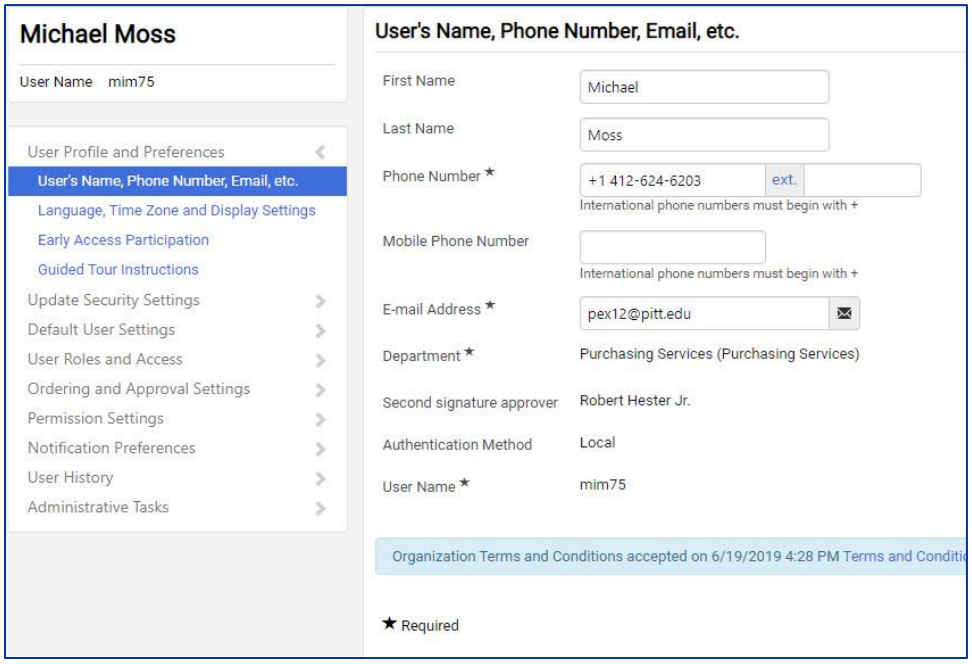


Your profile setting will open. Use the menu items on the left to navigate to each section. Here are some key parts:

Personal Information

The default page opens, the User's Name, Phone Number, Email, etc. page from the User Profile and Preferences menu. Here you can verify your personal information.

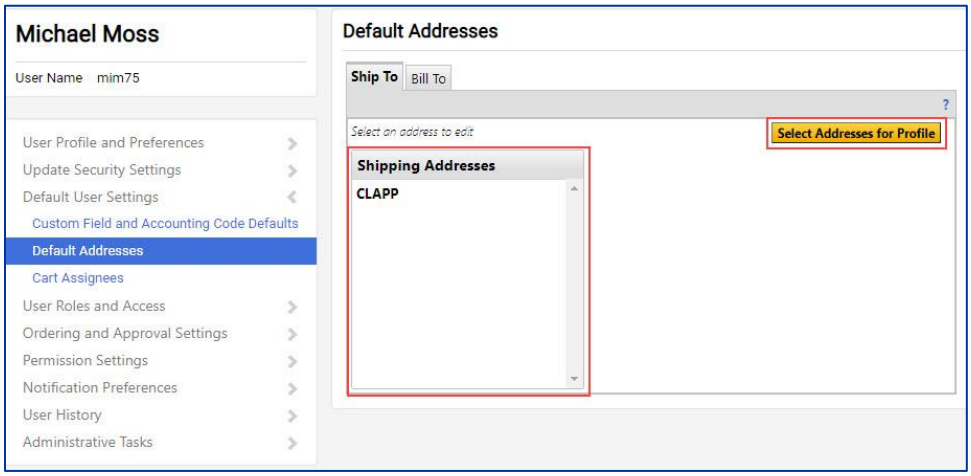
Note: It is important that this information is correct, as they will be added to your Purchase Orders as the default Contact information. The suppliers will use this to contact you. However, you can overwrite this during the Checkout process (to be covered later).



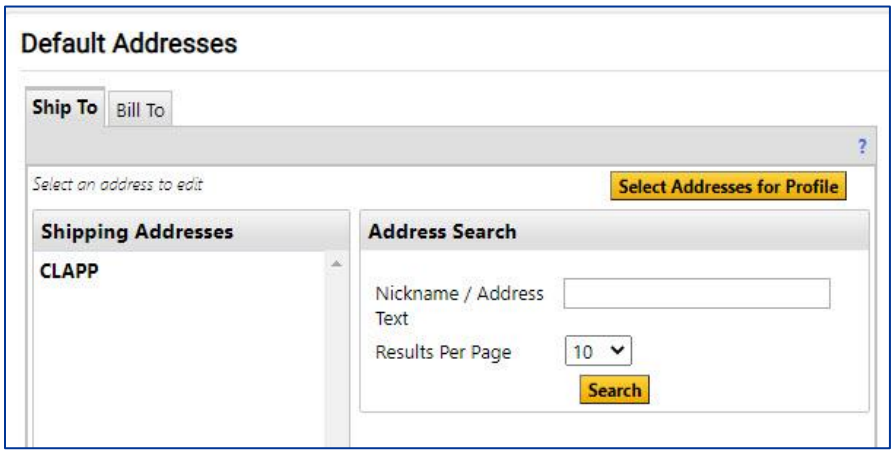
Address List

In the Default User Settings, Default Addresses you can set your default ship to address for your orders. Just like your personal information, it will be submitted as part of the order. The suppliers will use this as your Shipping Address. You can overwrite this during the Checkout process (to be covered later).

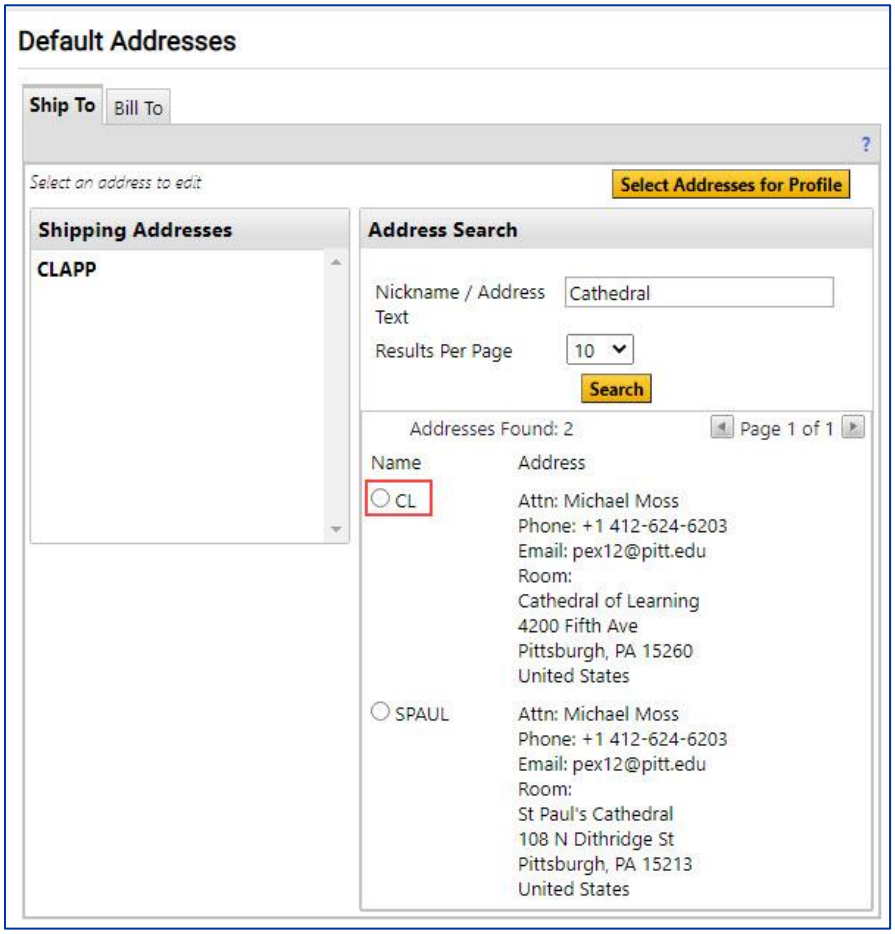
In the Shipping Addresses window, you will see the code/nickname of the addresses added to your profile. To add a new address to the list, click on Select Addresses for profile. NOTE: A user can set up multiple ship to addresses for their profile.



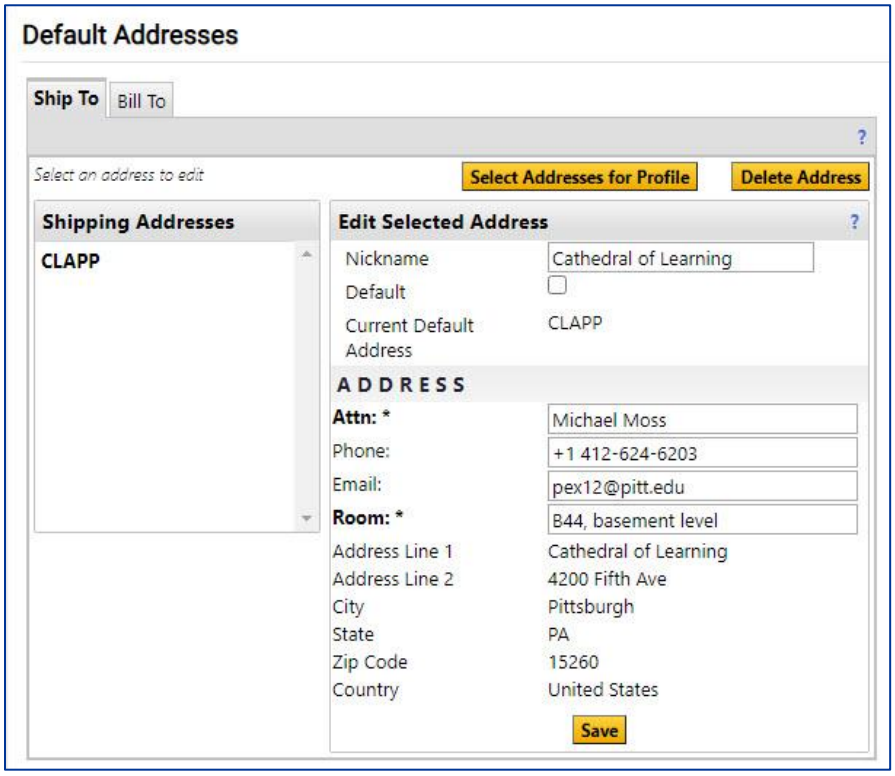
As you can see, you cannot enter an address, you can only select one from the list. Enter the Nickname or Address of the University Building.



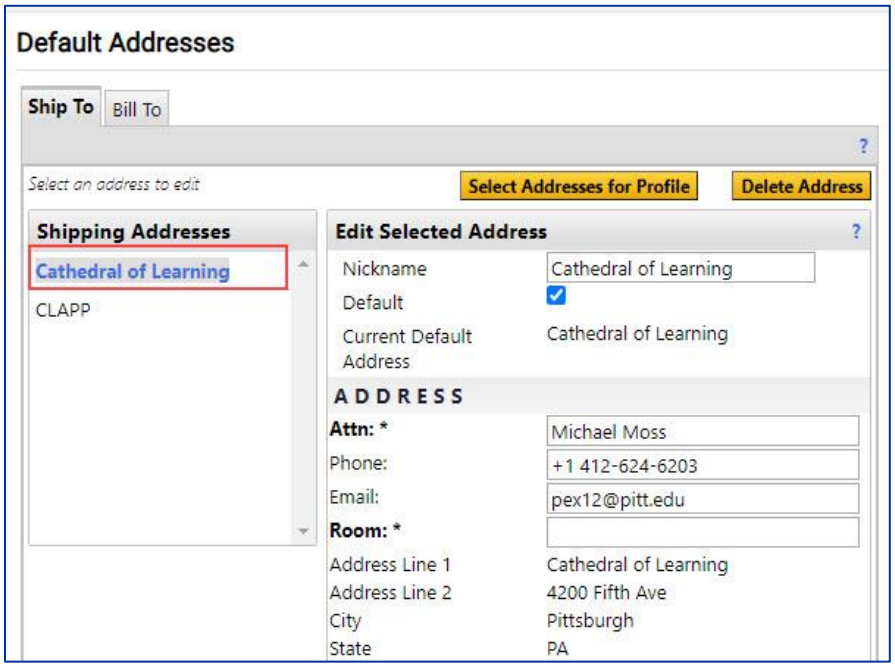
Select the building from the results by checking the circle selector next to the name. The Address profile will load. You can edit the Nickname and select this address to be your default.



Your personal information will load, and this will be saved with the address. Make sure to add the Room number – it is a required filed. You can also add additional directions in this field. Select Save to add the new address to your list.

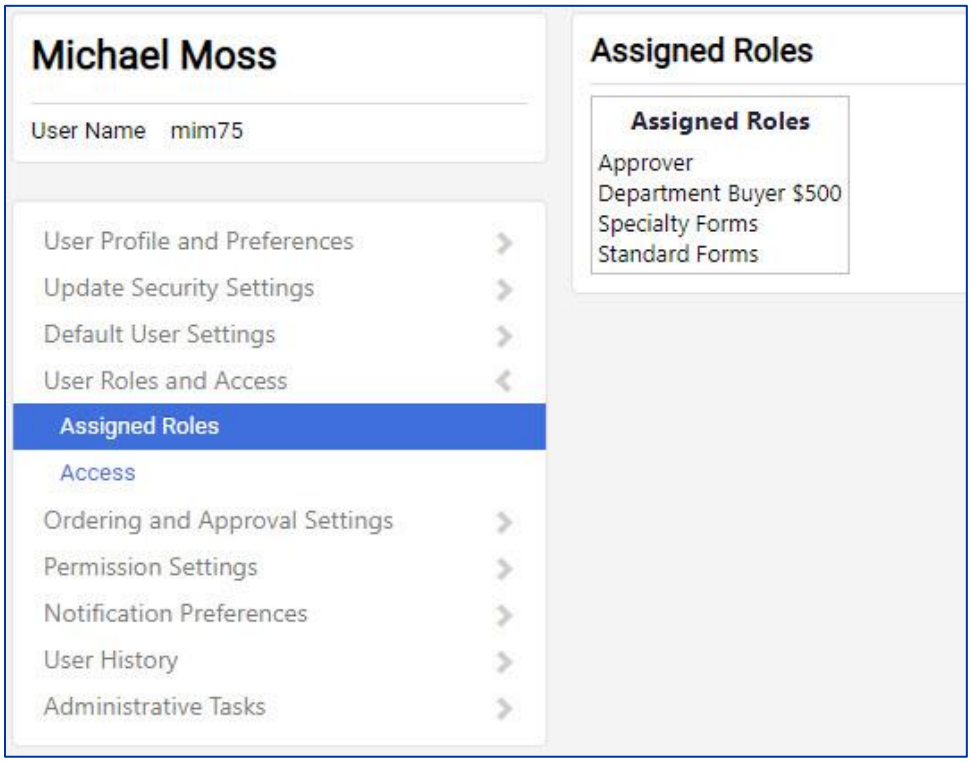


The address will be added to your list.



Assigned Roles

In the User Roles and Access menu you can find the Assigned Roles Option. Here you can verify the roles assigned to you.

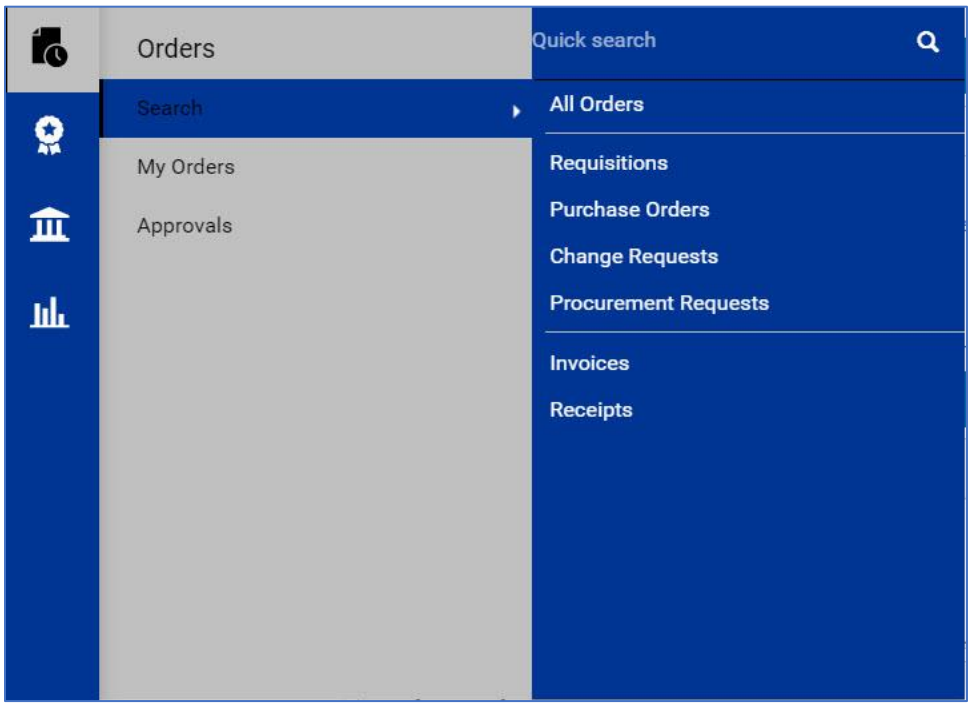


Learn more about the [PantherExpress System User Roles here.]

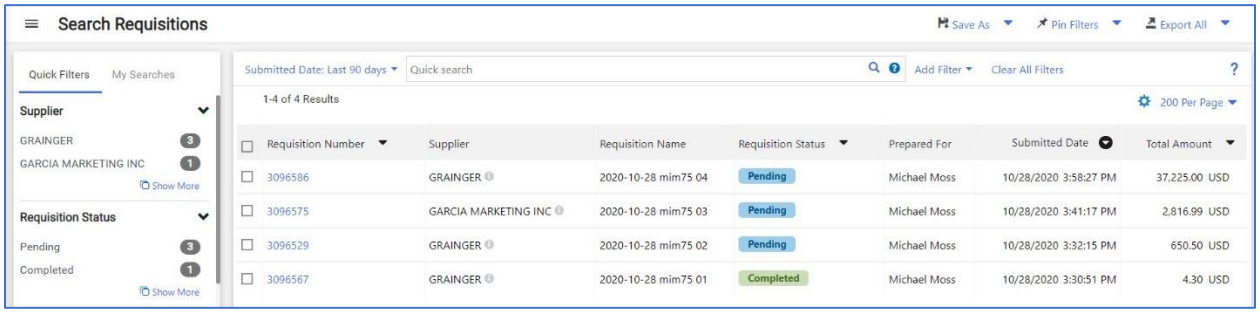
Searching for Documents

With the current search functionality, you can perform a quick, "keyword" search or an advanced search using filters. New search functionality allows for a more advanced way on how the filters are selected and managed. Additionally, in the new search, search results display on the search screen, where the current search takes you to a different screen.

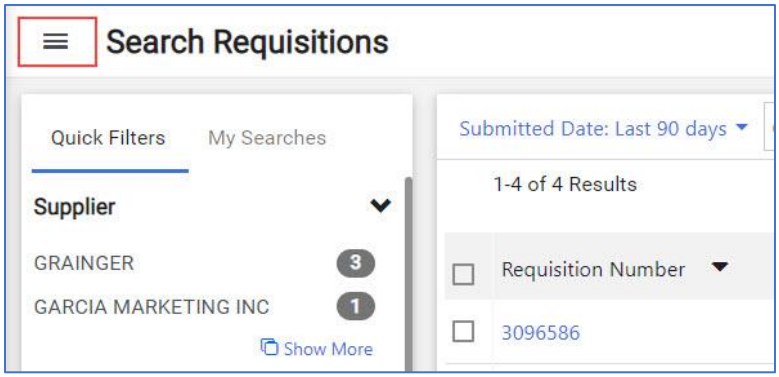
Access the new search for various documents via the Orders, form the Main Menu.



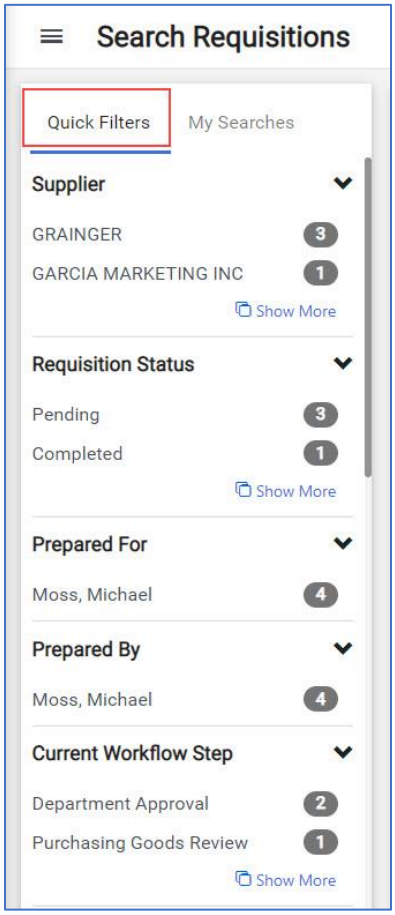
When an option is selected, results display by default for the last 90 days.



Select the Three parallel line Menu button next to the Search [Document type] to Hide or show the Quick Filters and My Searches panel.



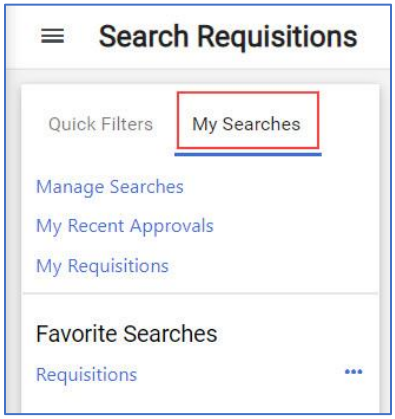
Quick Filters



A panel for Quick Filters displays on the left beside the My Searches panel, making it easier to see the filters available to further refine search results.

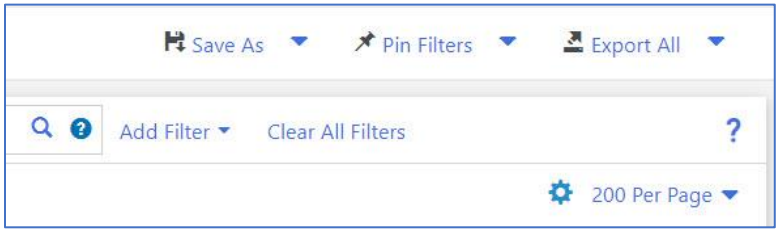
As with other search results pages, simply select or deselect options from the filter list to refine results.

The Quick Filter options will vary based on the document type, and the filter options configured by your system administrator.

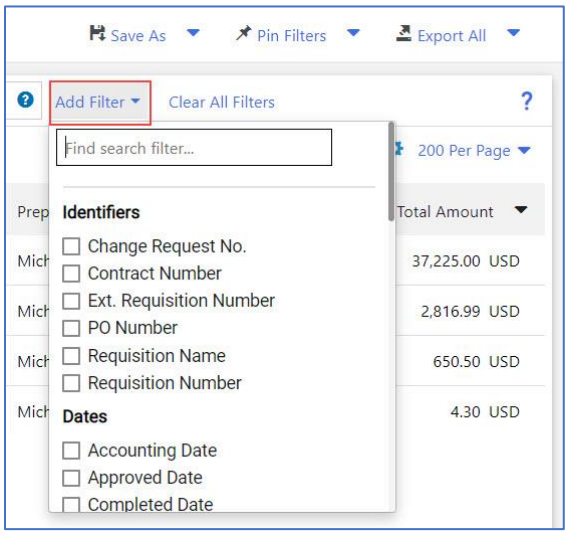


You can choose to manage searches and navigate to your own documents and approvals from the My Searches tab on the left.

After you initiate a search, several options are available for you to tailor your results.

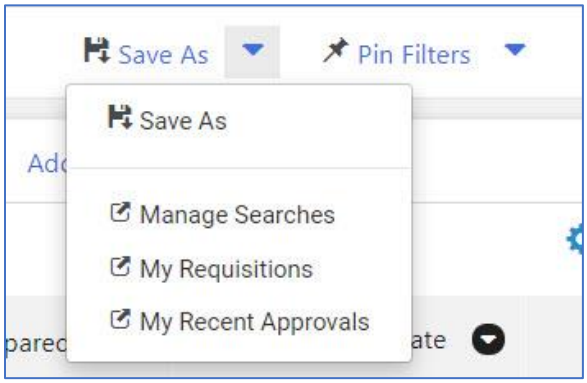


You can Add Filters to refine your search and Clear All Filters to get back to the default view.

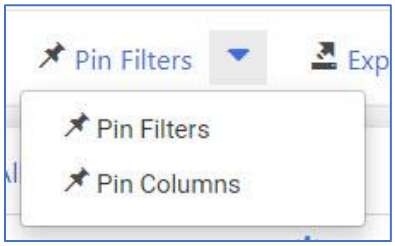


You are also able to Save these searches. The Save As panel also provides you a shortcut to the following functions:

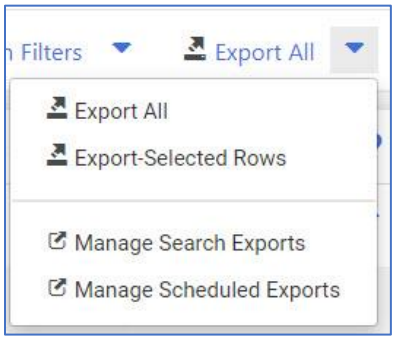
- Manage Searches
- My [Document type]
- My Recent Approvals



The Pin Filters button contains the options to Pin Filters and Pin Columns. This action is recommended when you use the same filters and column layout for searches, so you do not have to reapply filters and rearrange columns each time.



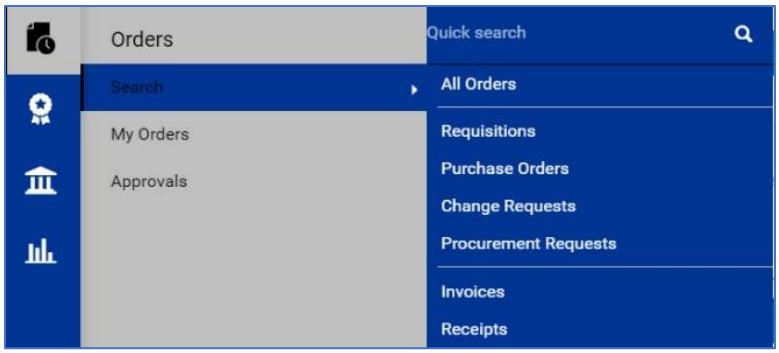
The Export All function provides you with the option to Export All or the Selected Rows, as well as manage search exports, scheduled exports, and export templates.



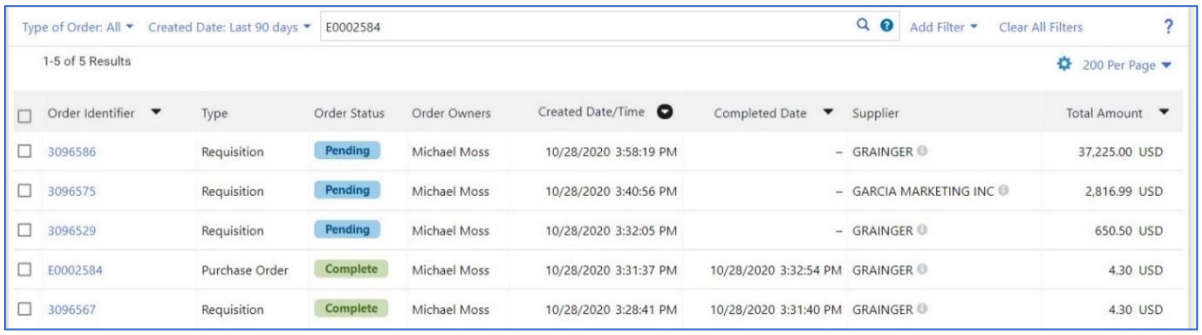
Performing a Quick Search

Hint: To learn more about Quick Search options, select the help icon (question mark) next to the search box.

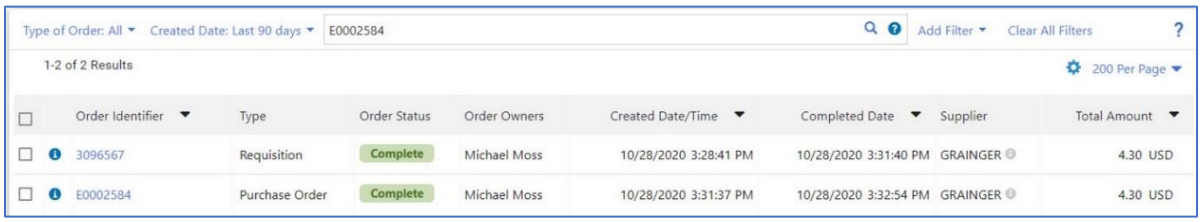
First, select the document type you are searching for, or select All Orders.



The Initial results will contain all document from the selected category created on the Last 90 Days. On the results page, enter a keyword or phrase in the Quick search field, for example a supplier or a document number.



Click the search icon or hit Enter. Matching documents are returned in the search results.

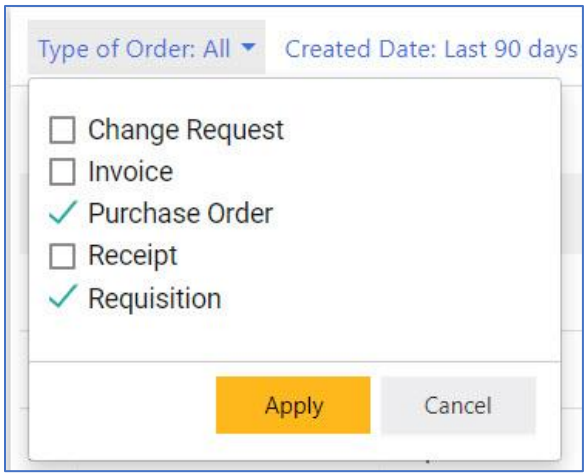


Note: Both the Purchase order and the Requisition is displayed in the example above, because the Requisition and the Purchase Order are related documents and belong to the same purchase.

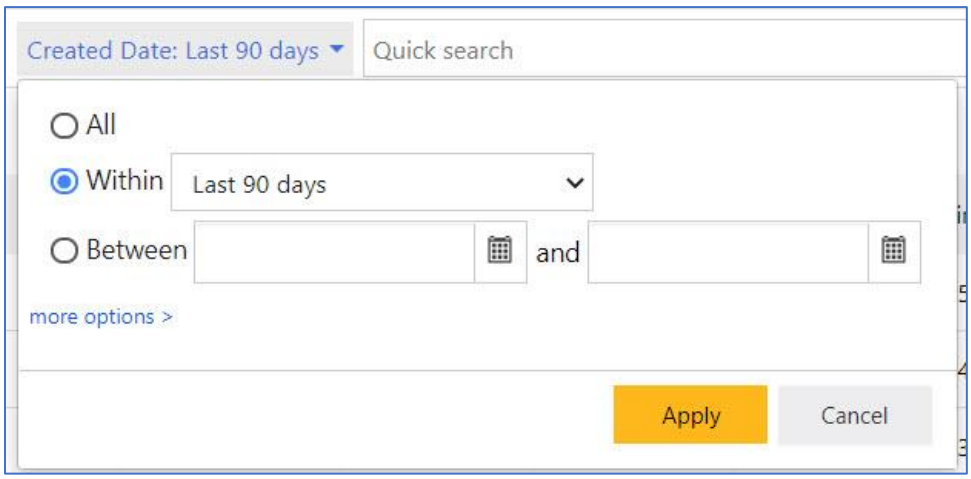
Performing an Advanced Search

Use the filter options to perform a more specific search.

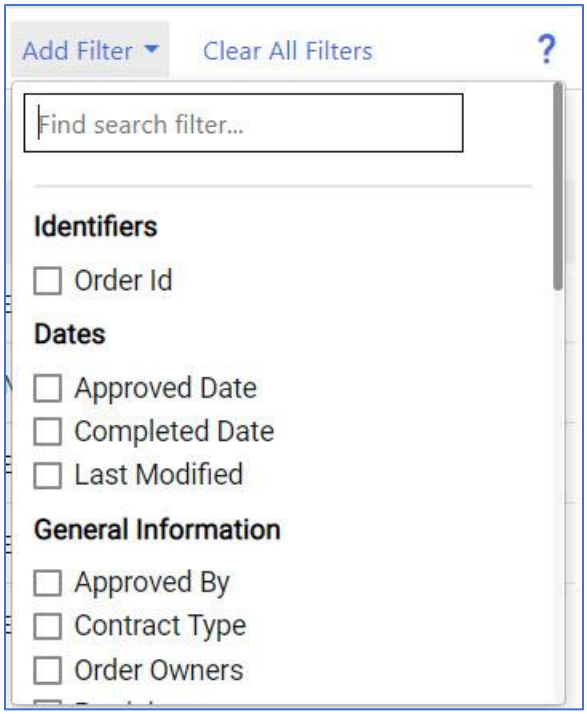
To choose a different document type, use the Type of Order option. Select the one or more document type, then select Apply.



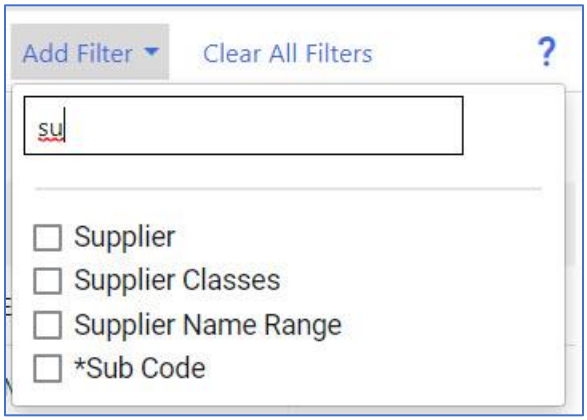
To choose a different date range, click the Created Date: Last 90 days drop down button, and select a different date option.



Add filters by selecting from the Add Filter button next to the Quick Search box, or by selecting from the Quick Filters tab to the left of search results.



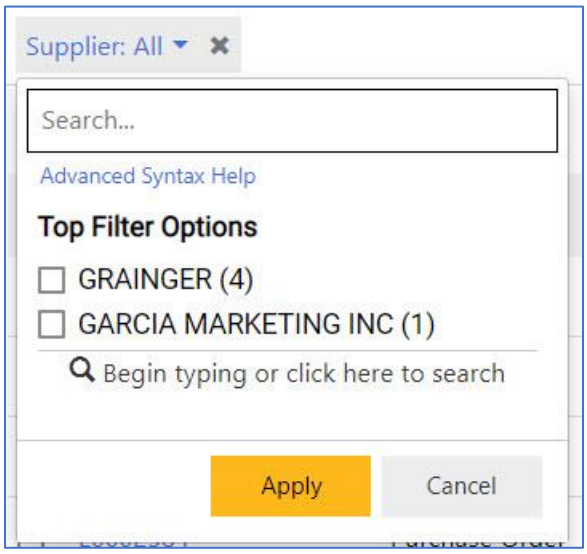
You can search for a specific filter by entering a value in the field. The list of filters will be refined and only matching filters display.



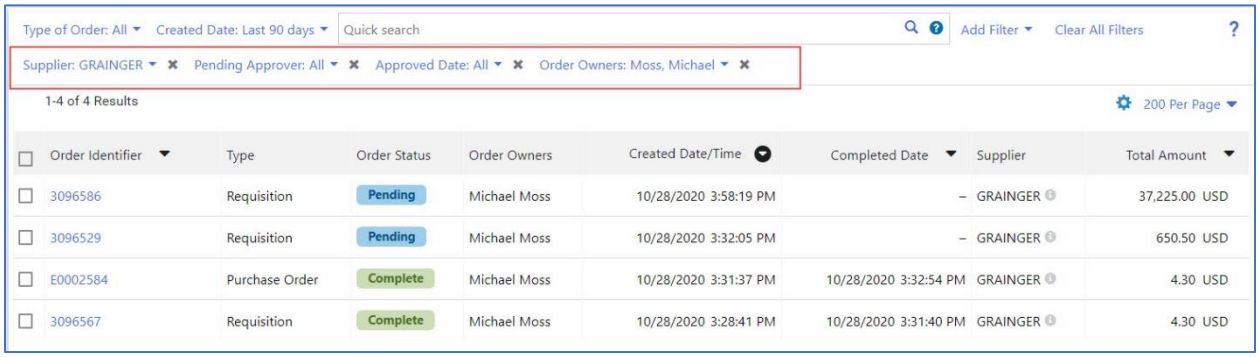
Select the checkbox for the appropriate filter, and the configuration options will display on the right. For example, if you choose Supplier, an overlay displays from which you can select the appropriate supplier.

Note: When there are many options, a list of "suggested" values displays with the configuration overlay. To choose a value that is not in Suggested list, enter a value in the search field.

When you have made the appropriate configurations to the filter, select the Apply button. The search results are refined to reflect the filter. The filter displays above the search results. Click the X to remove the filter.



Repeat the steps above to add additional filters. The search results update to reflect the new filters.

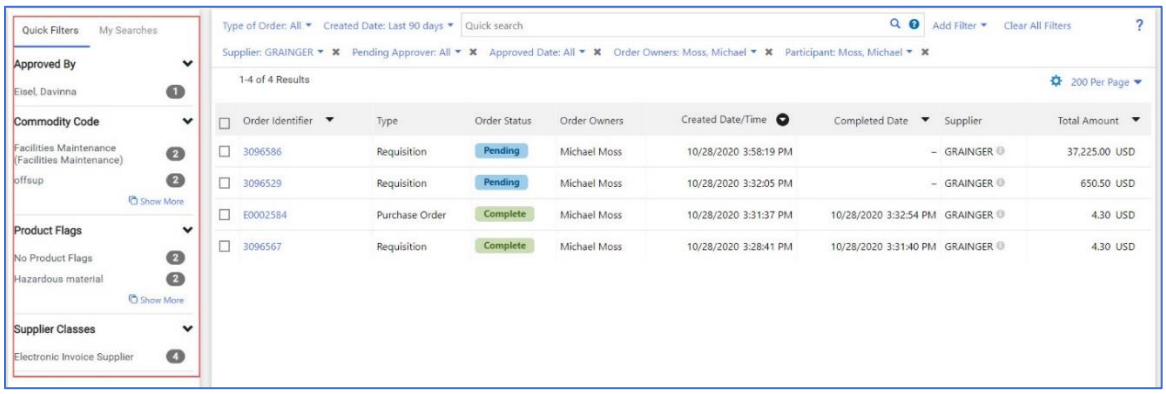


Using the Quick Filters Tab

If necessary, click the Expand button and select options from the Quick Filters on the left. Click the Show more... link to see additional values for a filter, if present.

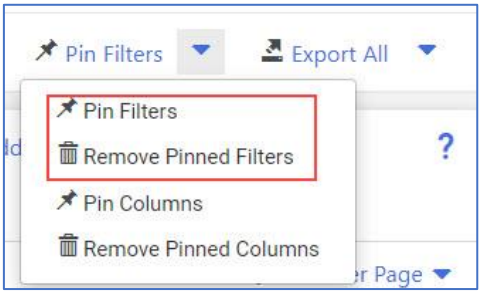
Note: The Quick Filter will add filters to the top of the results and apply the filter at the same time. It is an alternative to the Add Filter option.

Click X to remove the filter above search results, and/or continue to refine using the Quick Filter options.



Best Practice: If you would like to keep the filter configuration as the initial default search for all searches of this type going forward, select the Pin Filters button. Each time you return to the search page, the pinned filters will be applied by default. You can still add/remove filters. This only changes the initial search results filters applied when landing on the search results page.

To remove the pinned filters, select the Remove Pinned Filters option (only displays if you have pinned filters).



Note: The Pin action only applies to the current search type. For example, if you pin filters for Purchase Order Search, they will apply on to the Purchase Order Search. You can pin different filters on different search pages

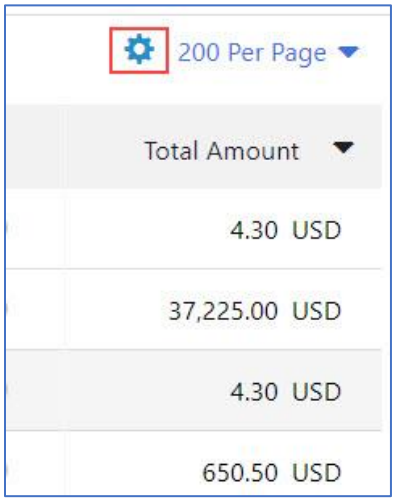
Sort Search Results

You can sort search results by any of the columns indicated with a sort icon, a downward or upward pointing triangle, depending on the Sort direction. The column used for sorting is indicated in a circle.

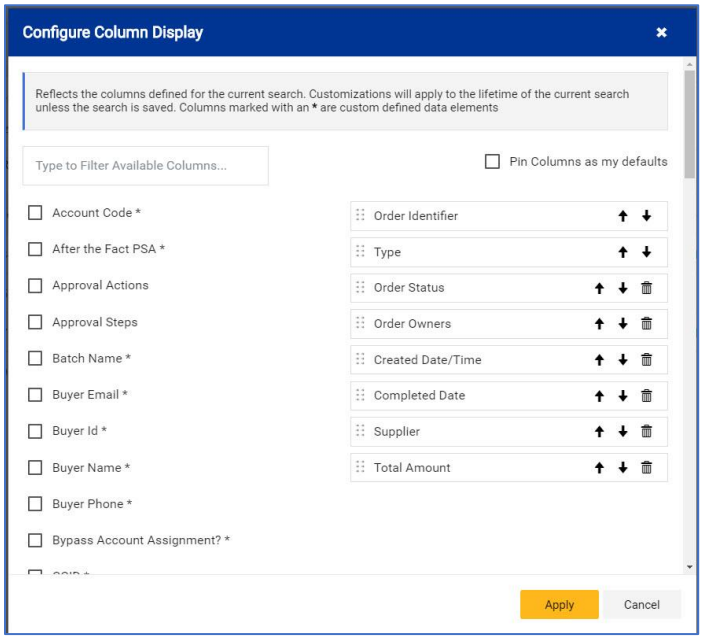
Configuring Search Results Columns

You can choose the columns that display in the search results and the order in which they display.

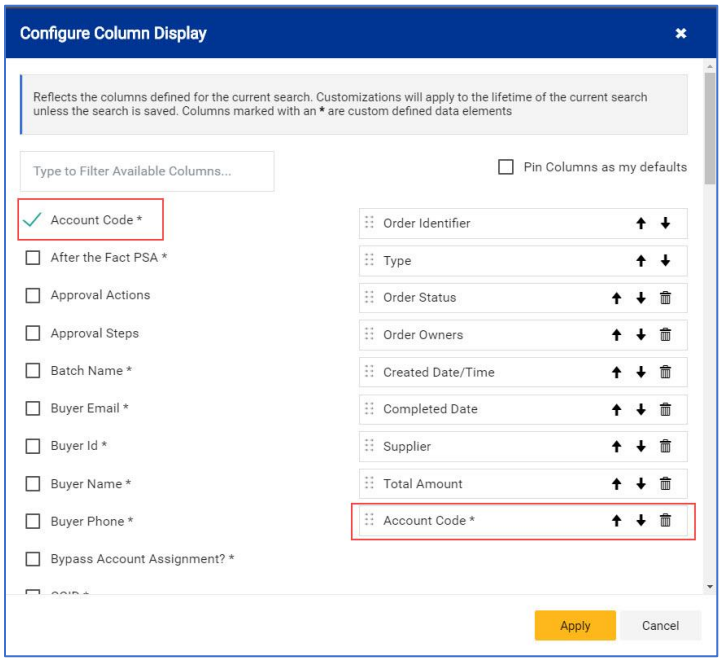
On the Search Results page, click the Configure Columns (gear) icon located on the right, above the document list.



The Configure Column Display screen displays. A list of all available columns displays on the left, and a list of selected columns displays on the right, where you can sort the order in which they display on the search results page.



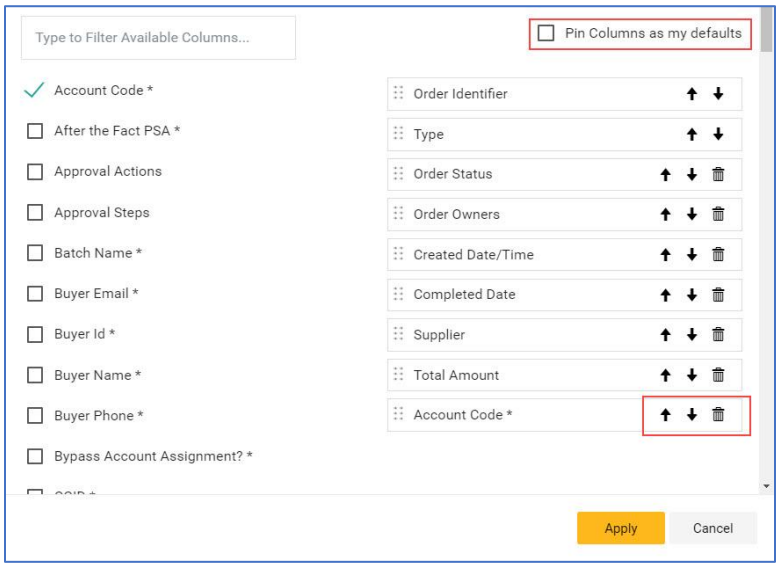
To add a column, locate the column(s) by scrolling through the list or entering a value in the search field. Click the checkbox for each column you would like to add from the available column list on the left. The columns are automatically added to the bottom of the selected columns list on the right.



To delete a column, locate the column from the list on the right side, and click the trashcan icon. The column is moved to the available columns list.

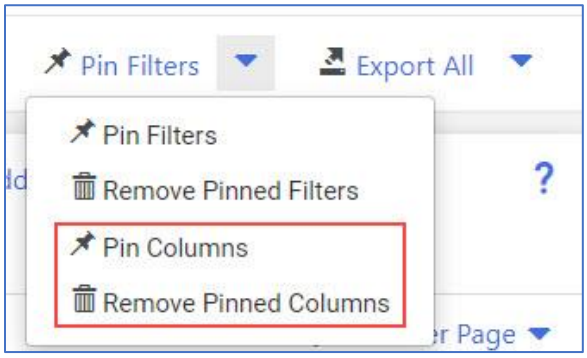
To Manage column display order, click and drag the columns to the selected location or use the arrow icons to move the columns up and down.

Best Practice: If you would like to keep the column configuration for all searches of this type going forward, select the Pin columns as my defaults checkbox, then select Apply.



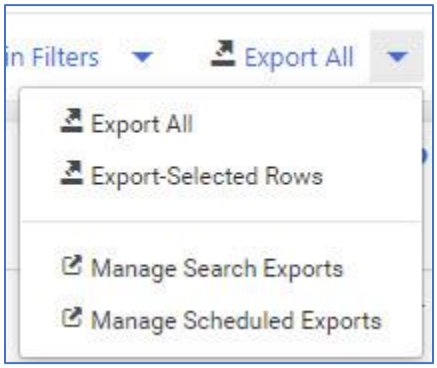
You can also pin columns by selecting the Pin Columns option in the Pin Filters dropdown above search results. To remove the pinned columns, select the Remove Pinned Columns option (only displays if you have pinned columns).

Note: The Pin action only applies to the current search type. For example, if you pin columns for Purchase Order Search, they will apply on to the Purchase Order Search. You can pin different columns on different search pages.

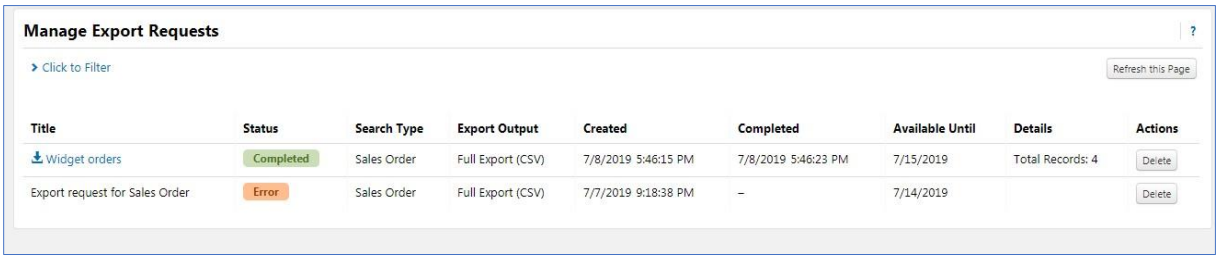


Export Search Results

When you perform a document search you may want to export the results for further reporting and analysis. The export feature allows you to export all or selected results upon request and to schedule instances of certain report types.



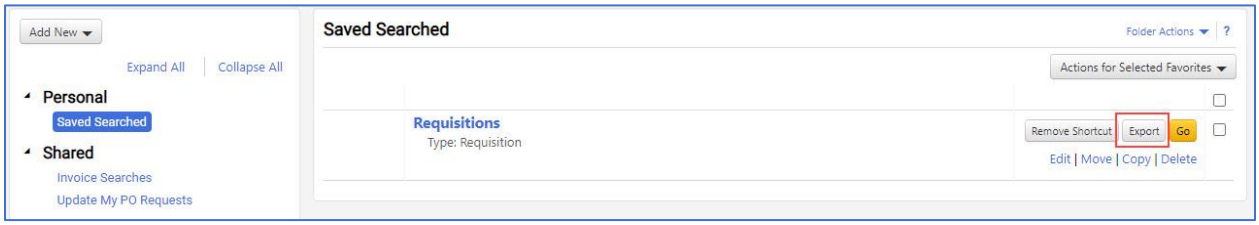
When you export a search, a .zip archive is created for download that contains one or more Excel CSV file(s). The file is available on the Manage Search Exports page from your user profile, or by selecting Manage Search Exports from the Export All dropdown on the search results page. The file is available until the Expiration Date designated for the export.



Exporting Results from a Saved Search

When you export a saved search, dates will be relative to the time you request the export vs. the date you saved the search. For example, if you select to export a saved search that searches for the last 30 days, it will return results dated 30 days from the date of the export.

Navigate to Manage Searches page (User Profile > Manage Searches or select the Manage Searches link on the search results page) and locate the search you would like to export. Select the Export button.

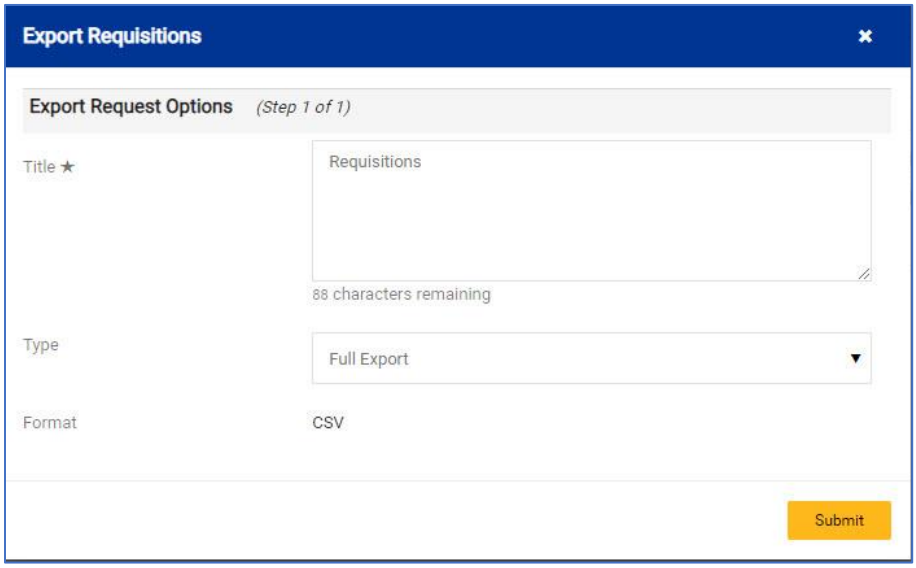


Enter a Title for the export. You may also enter a Description, but one is not required.

Select a Type of export - Screen Layout, Transaction, or Full.

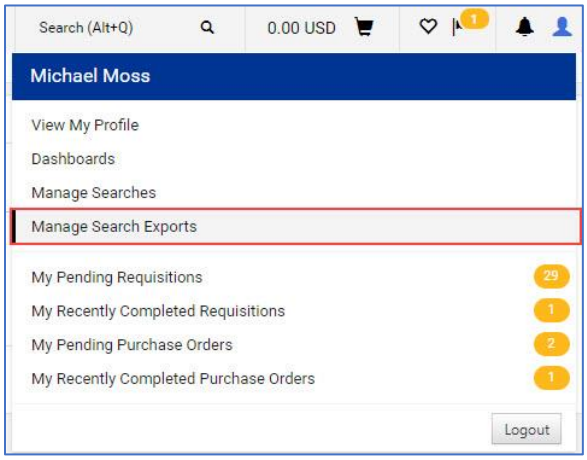
- Screen Layout Exports: Screen exports will export the search results exactly as they appear on the results screen with no additional data.
- l Transaction Exports: Transaction exports will export all information available about the transaction associated with each document.
- l Full Exports: Full exports will export all information available about the transaction associated with each document. Full exports also include document history such as approvals, comments and more.

Select the Submit button. Your export request will be submitted, and the file will be available on the Manage Search Exports page,

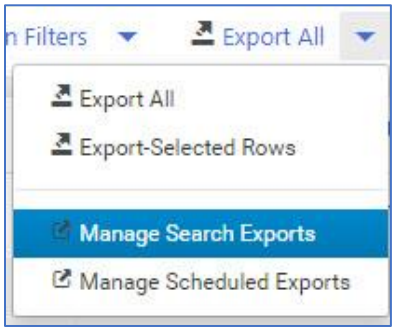


Downloading Search Exports

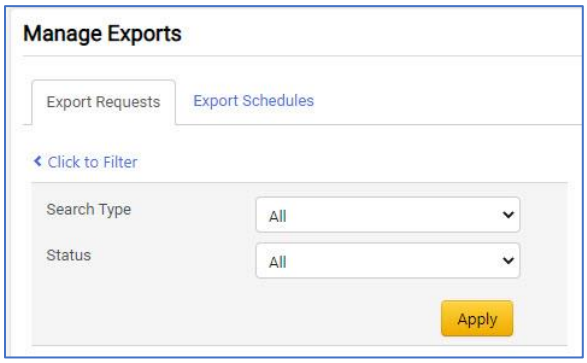
Navigate to Manage Search Exports page (User Profile > Manage Search Exports.



You can also select the Manage Search Exports option from the Export All dropdown on the search results page.



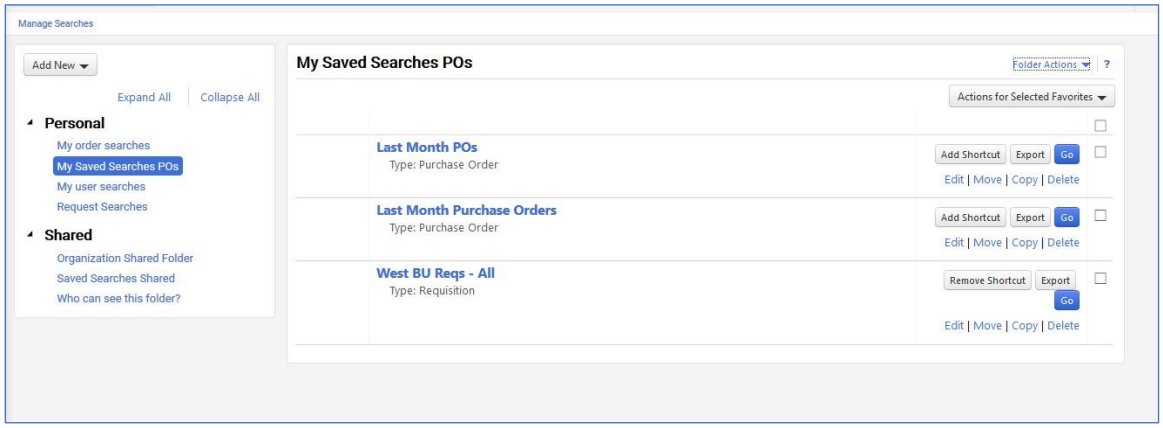
If there are several exports you may want to filter them to locate the export you want to download. Define the search type and status, then select Apply.



Saving Searches

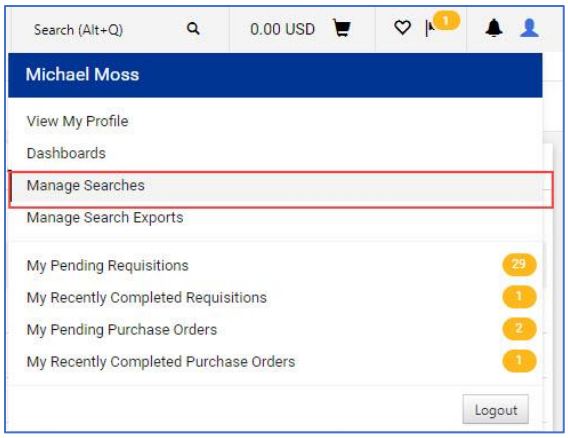
Saved searches are created from the search results page. When you choose to save a search, you are essentially saving the search you executed to get to that results page. It is important to note that when you execute a saved search the dates will be relative, meaning the last 30 days would be from the date of report execution instead of the date that the report was saved.

Saved searches are organized in folders. You may create your own personal folder(s) to store various searches. With the appropriate permission, you may create shared folders to save searches so that other users may access those searches.

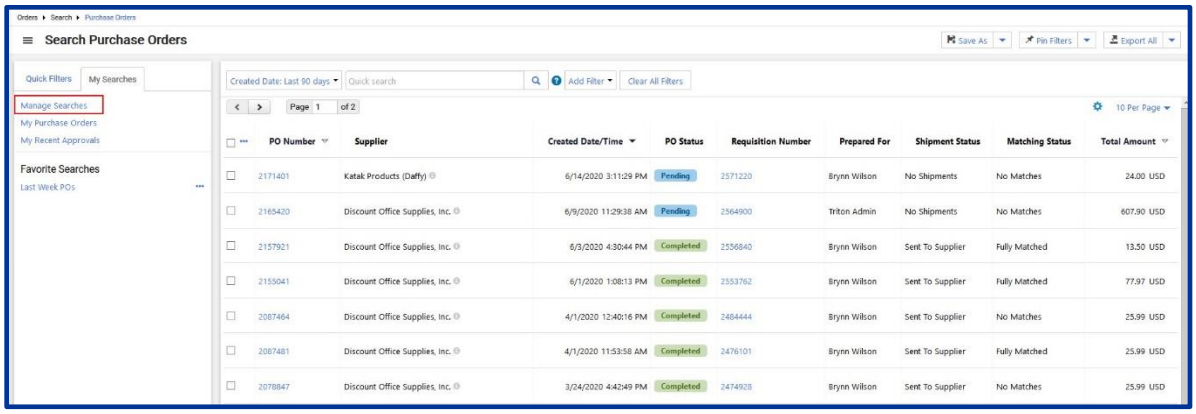


Searches can be deleted and moved/copied to another folder. Search names and descriptions can be edited. When viewing saved search results, you can add filters to modify results, and save the existing search or save the updated criteria as a new saved search.

The Manage Searches page provides a global view of all saved searches for your department. It is available under the user profile dropdown.



You can also access the Manage Searches link on the search pages.

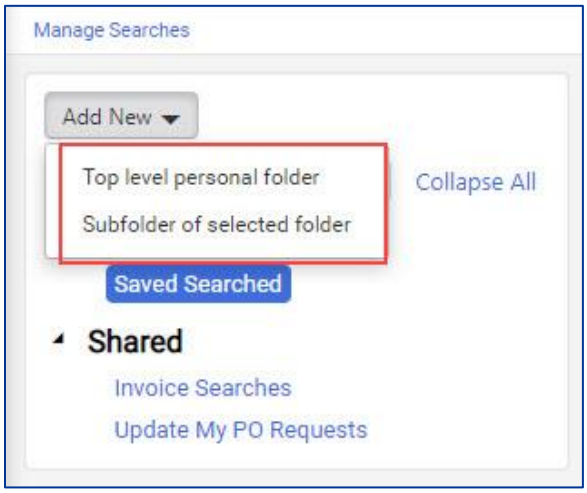


Create a Saved Search Folder

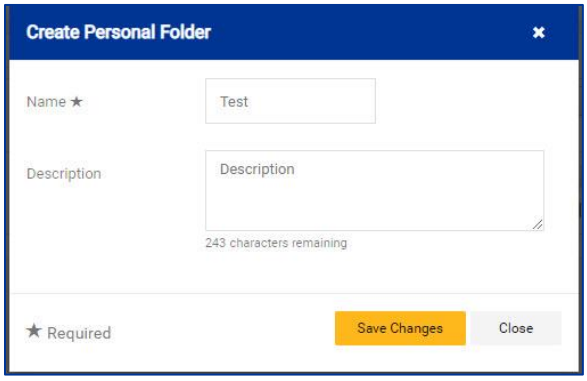
You can create a Saved Search folder from the Manage Searches page and at the time you save a search. You will be presented with the option to create a new folder. If you choose to do so, you can follow the same steps as below.

Navigate to Manage Searches or a Saved Searches page. Select the Add New button in the top left. Select the type of folder you would like to create:

- Top level personal folder – this will create a new top-level folder that will be available only to you. Searches saved in this folder will not be accessible by anyone else in the organization.
- Subfolder of selected folder – this will create a subfolder of a folder that you have selected. This option will not be available if there is no folder selected.



Enter a name and description for the folder. Select Save Changes. A new folder will be added to the area you selected.



You can manage your saved searches using the options at the end of the line:

- Remove Shortcut
- Export
- Run
- Edit
- Move
- Copy
- Delete

Suppliers

Contracted Suppliers

University-wide Contracted Suppliers offer the best overall value to the University. This means that in addition to discounted prices for the University's most frequently purchased items, University-wide Contracted Suppliers offer excellent service, direct on-time and generally free delivery, no-hassle returns, a quick and easy paperless ordering and payment process through the PantherExpress System, and other important contractual protections for the University.

University-wide Contracted Suppliers are very good about meeting or beating competitors' pricing. When you find better pricing from an alternate supplier, contact the University-wide Contracted Supplier's account manager to ask about meeting or beating the alternate supplier's price. To find the University-wide Contracted Supplier's contact information, use the directory below to find the supplier, then click the supplier's name for contact information.

If the University-wide Contracted Supplier cannot meet or beat the alternate supplier's pricing, follow the guide below on how to assess benefits versus risks - and how to make purchases from alternate suppliers when necessary.

You can find more information the University-wide Contracted Supplier Directory.

Non-Contracted Suppliers

If your requirements are unique and a technically equivalent product is not available from a University-wide Contracted Supplier, follow visit this page for guidance on how to assess benefits versus risks - and how to make purchases from alternate (i.e., non-University-wide contracted) suppliers when necessary.

Purchase types

There are three ways to initiate purchases in the PantherExpress System, depending on how the selected supplier shared its inventory with the University of Pittsburgh.

Hosted Catalog Supplier

These suppliers added their catalog to the PantherExpress System, making it searchable from the Home Page.

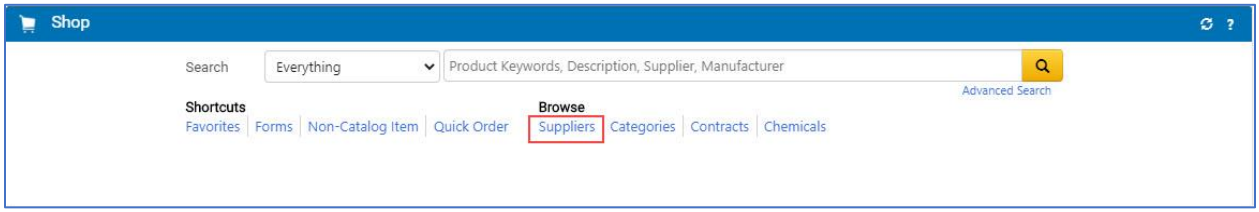
Punch-Out Supplier

These suppliers created a custom website for Pitt, linked to the PantherExpress system.

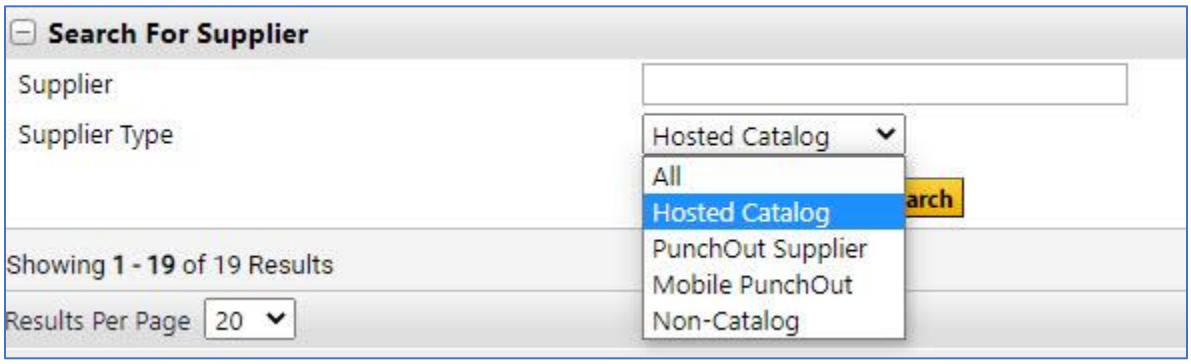
Non-Catalog Supplier

These suppliers do not have catalogs to provide to Pitt in any form. Purchasing from these suppliers requires initial knowledge of their products.

To verify the preferred purchase method for a supplier, Select Suppliers on the Shop window on the Shopping Dashboard.

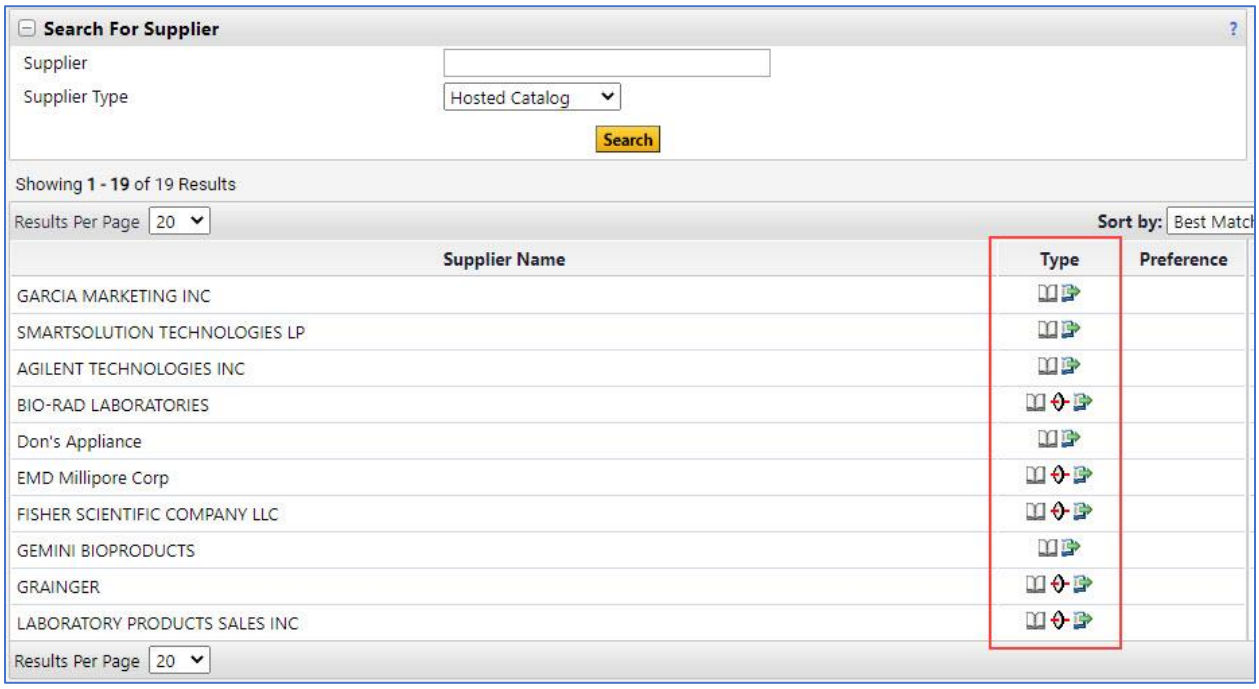


Search for the Supplier name, or filter by Supplier Type:



In the Type column, you will see the type of supplier, which will indicate the method used to purchase from them. Notice, that some suppliers chose to share their products multiple ways.

The booklet Icon represents Hosted Catalogs, the Bullseye icon represents Punchout sites, and the half booklet with a Green Arrow represents the Non-Catalog suppliers.



Note, that Non-Contracted suppliers will mostly be Non-Catalog suppliers, However, some Contracted suppliers are also Non-catalog suppliers.

Purchasing Workflow

On the table below you can see the basic workflow of a regular purchase. This document will cover all elements of the purchasing process.

Creating Purchase Orders - Catalog Orders

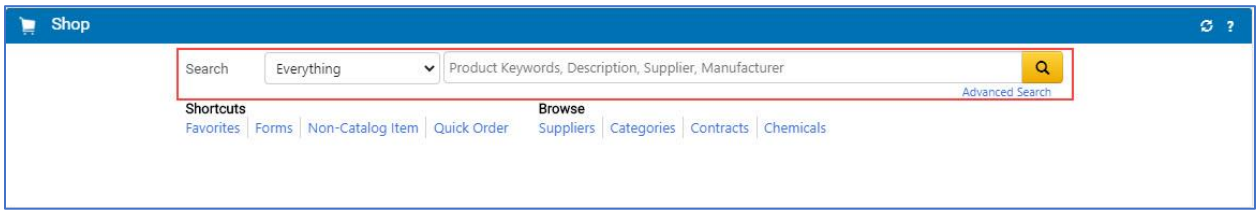
As you have seen above in the workflow, the process starts with identifying your supplier and searching their catalog/Punchout Site or Searching the Catalogs to find an item form all sellers.

Catalog Requisition

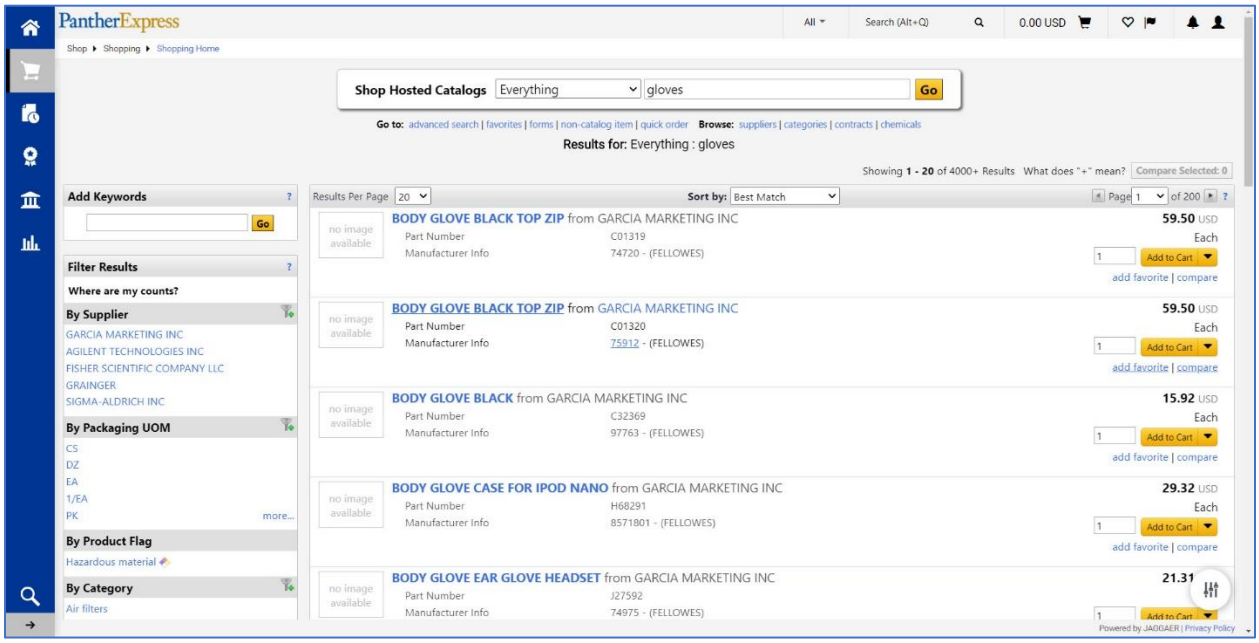
A Requisition is a request to order. All Purchase Orders start as Requisitions, and as they pass the system controls, they will trigger the creation of Purchase Orders. In order to create a Requisition, first you need to identify your items.

Searching for Items

You can search for items sold by Catalog Suppliers using the Search bar on the Shop window of the Shopping Dashboard. Use the drop-down filter to narrow your search.

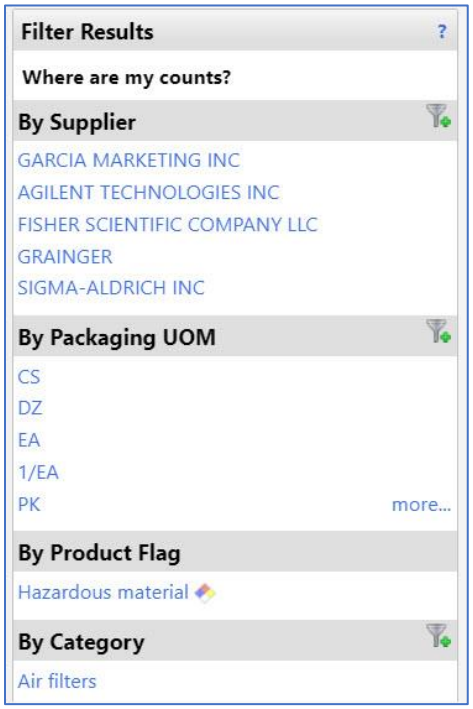


Note: The Shop Search feature only searches in the Hosted Catalogs!

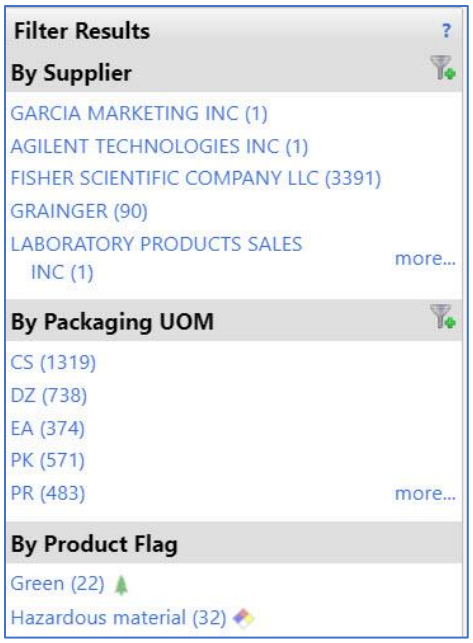


Filters

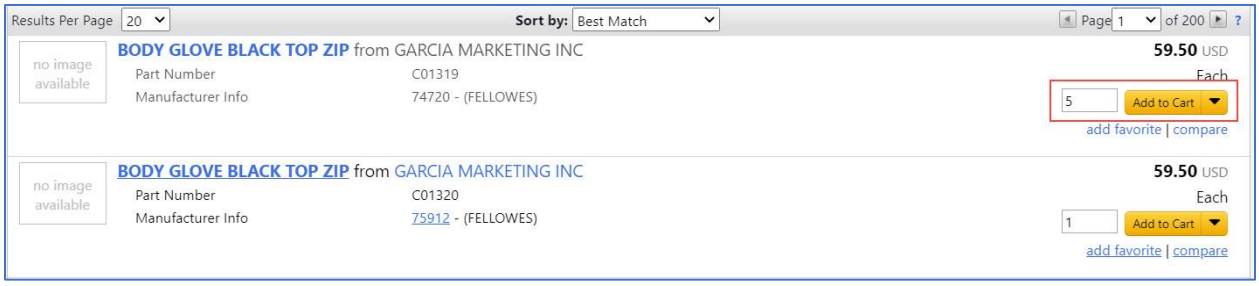
Use the filters on the left to narrow your search. You can filter by a variety of options.



Note, if the search returns less than 4000 results, counts will be added to each filter.



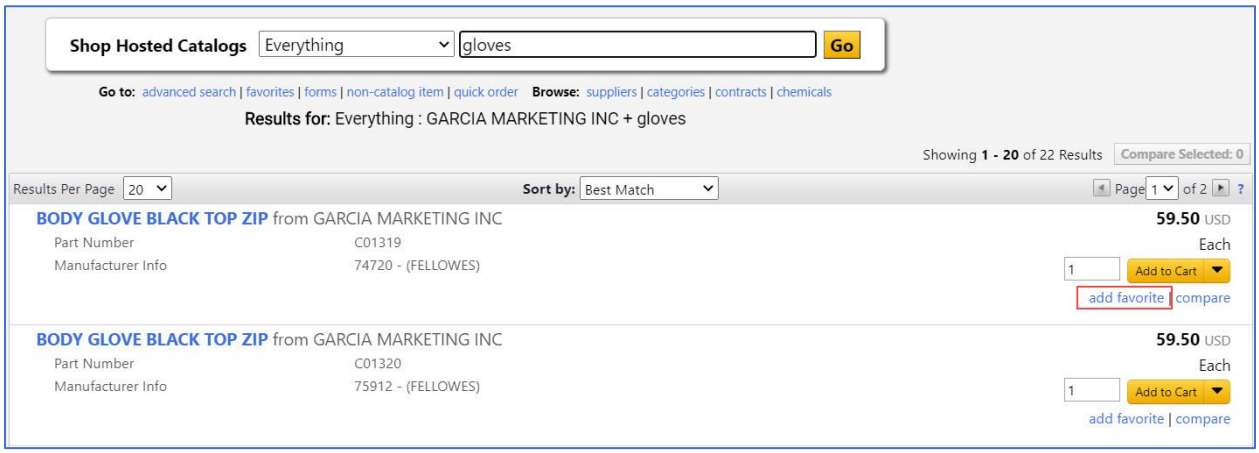
To add an item to your Cart, define the quantity, then select the Add to Cart button on the end of each product line.



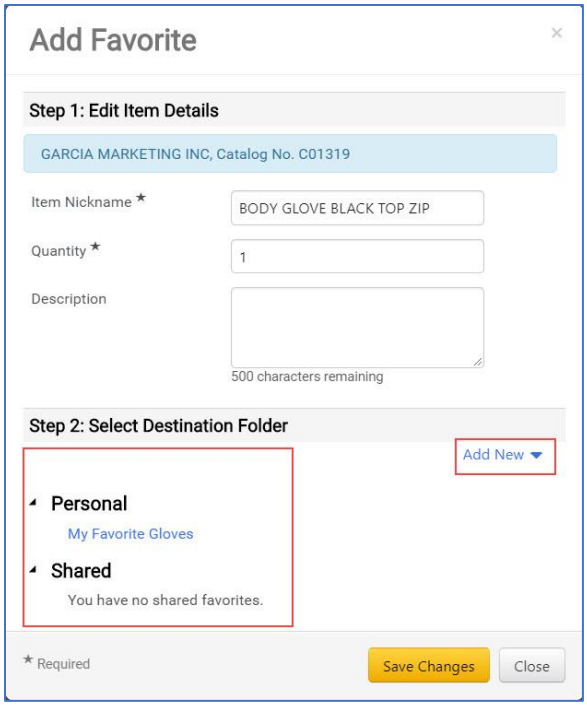
Favorites

Catalog Searches usually return many results. The use of favorites can be beneficial, as this provides a simple and efficient way to save and quickly reorder your favorite items.

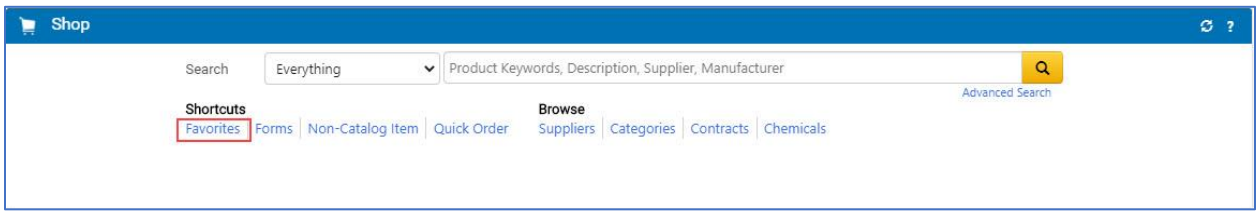
Once you found your preferred item, select the add favorite link under the item price.



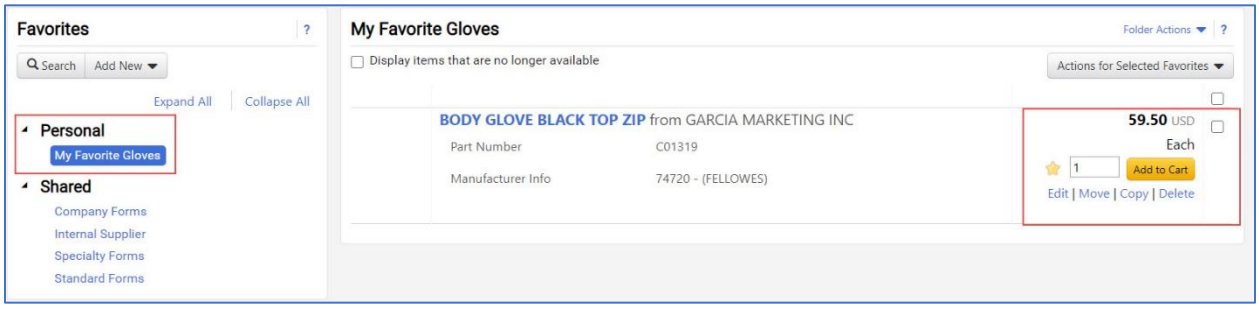
The Add Favorite window pops up, there you can add your item to your Personal or Shared Folders, or you can create new folders. Select Save Changes to add the item to your favorites.



You can access your Favorites using the Shortcuts in the Shop window on the Shopping Dashboard



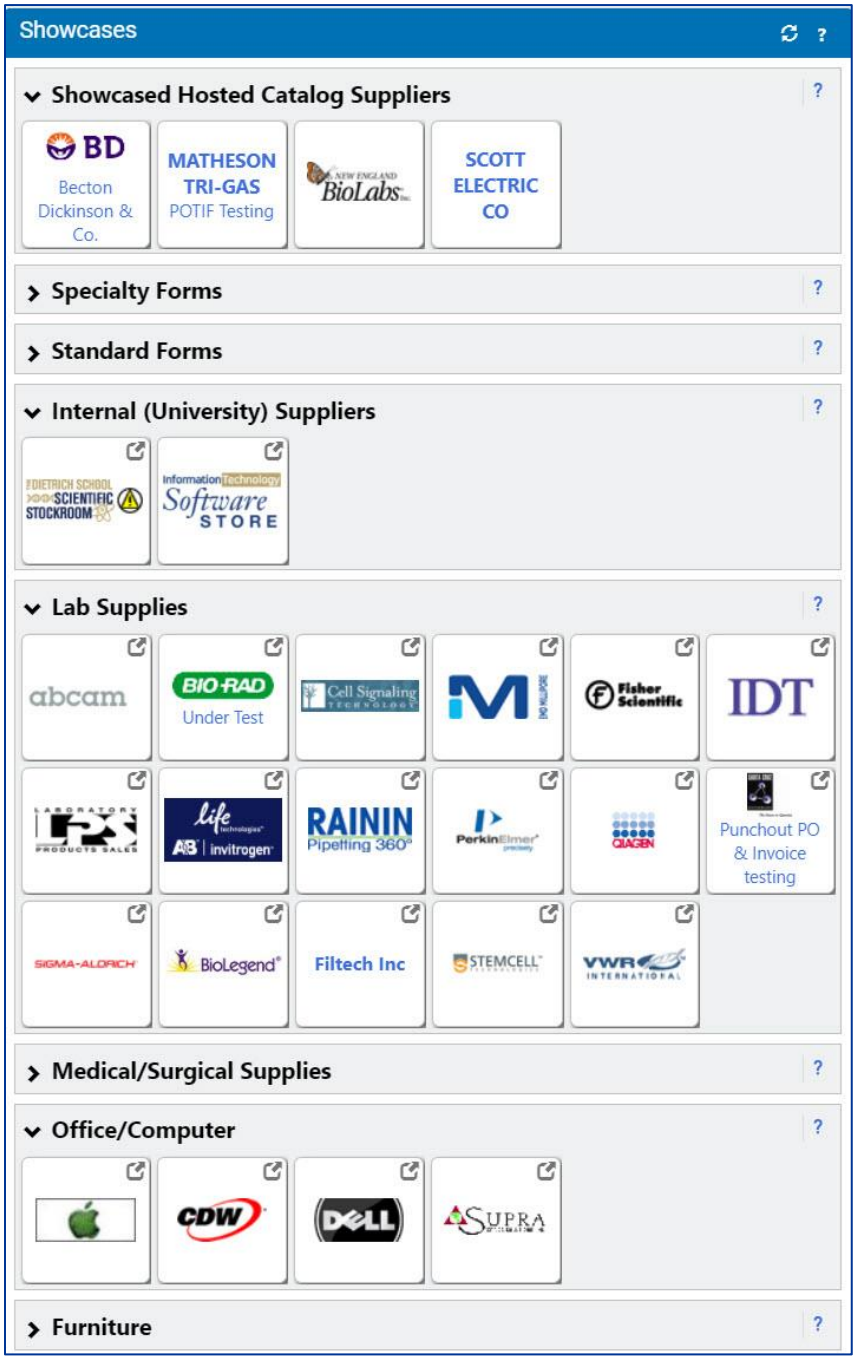
Select the folder where your item is saved, then add the item to the Cart.



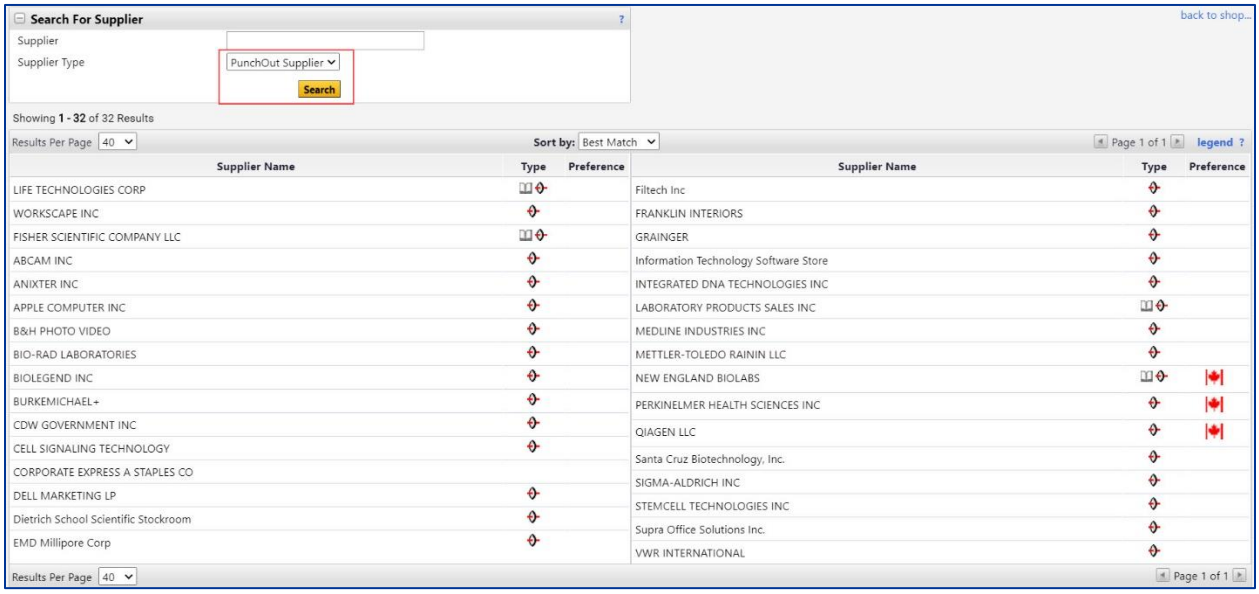
Creating Purchase Orders - Punchout Orders

Punchout suppliers

Punchout suppliers are suppliers that created a special shopping website where Pitt can purchase their goods. You can find the Punchout sites on the Shopping Dashboard, in the Showcases window.



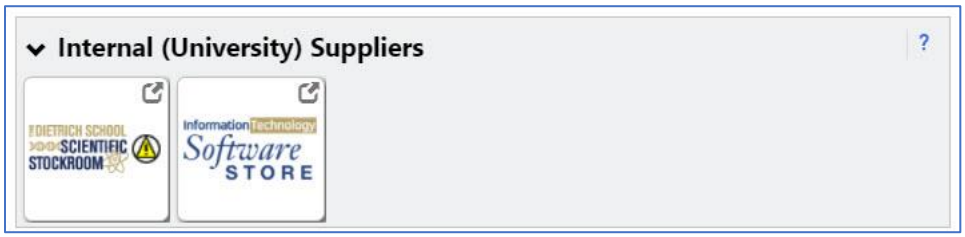
You can also search the supplier database on the Shopping Dashboard. Filter the suppliers by order type.



Internal (University) Suppliers

There are two Internal (University) Suppliers that have Punchout sites:

- Dietrich Scientific Stockroom – All purchase must be charged to subcode 6088, no matter what subcode the lines would be charged otherwise.
- Pitt IT Software Store - purchase must be charged to subcode 6021, no matter what subcode the lines would be charged otherwise.



Punchout sites

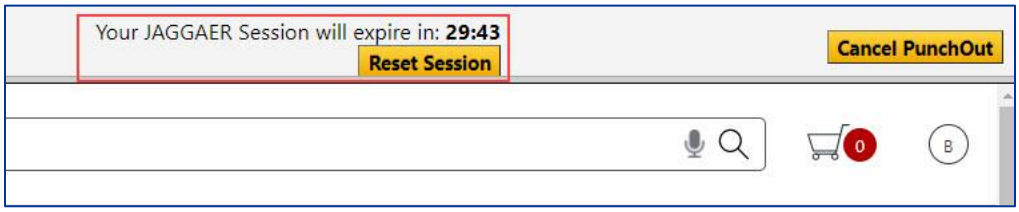
Each Punchout supplier has a Punchout site, that you can access from the Showcase window on the Shopping Dashboard. As all of these sites are different, there are some important features that apply to all of them.

Users

When opening a Punchout site, you are automatically logged in as a PantherExpress user.

Timers

Most Punchout sites have timed sessions, that activates when you open the site. This timer is set to 30 minutes, that you can extend by clicking on Reset Session.

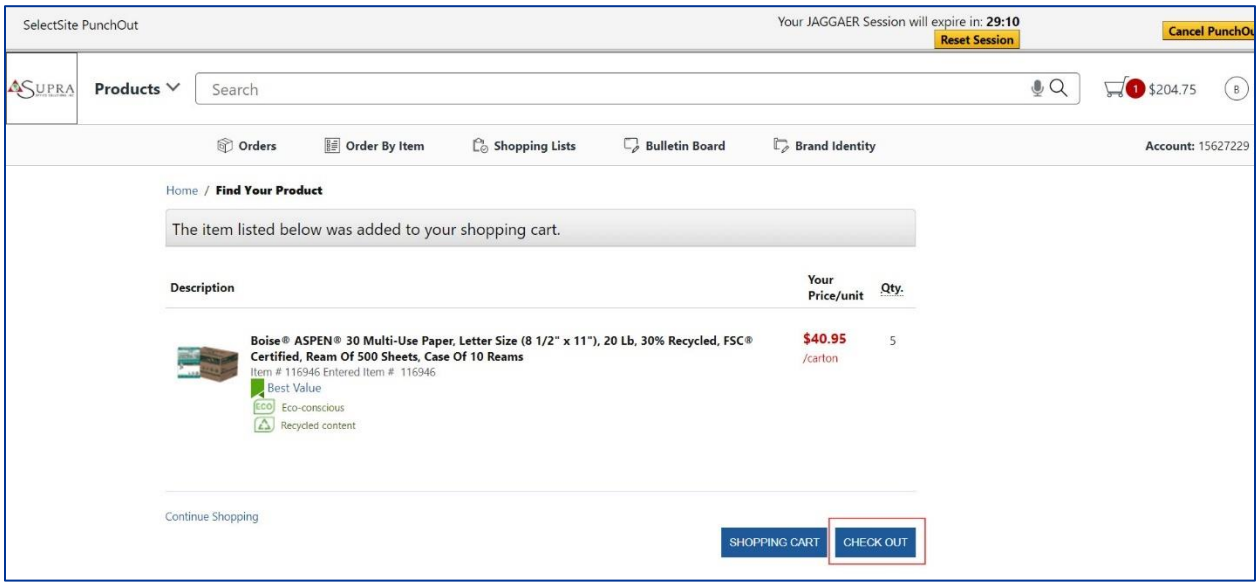


Note: If the timer expires, your session will be cancelled, and you may lose the contents of your cart.

To avoid losing your items, save them as Lists or Favorites. Most sites will provide you an option for saving items. Doing this, you will be able to recover the contents of your cart even if the session has ended.

Checkout

Once you have collected your items and you are ready, select Checkout in your cart.



,

The Punchout site will return you to your Active Cart in PantherExpress.

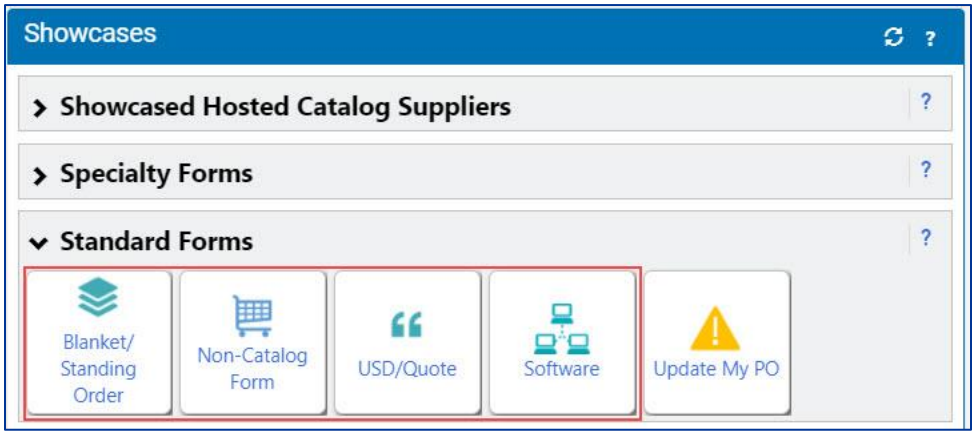
Once your items are in your cart, follow the same procedure as the Catalog Orders to complete your Purchase Order.

Note the following in the supplier information:

- The item(s) in this group was retrieved from the supplier's website.
- You can no longer access this item(s) on the supplier's website. This message is displayed when items are added from an earlier request (e.g., cart, favorites) or the supplier does not support returning to the Punchout site to make changes to the selected lines. If changes are required, delete the lines from the shopping cart and start a new Punchout session to the supplier.

Standard Forms

You can find the Standard Forms on the Shopping Dashboard, in the Showcases window.



Currently, there are four Standard Forms:

- Blanket/Standing Order
- Non-Catalog Form
- USD/Quote Form
- Software Form

Note:

- The Update My PO form is housed in the Standard forms section; however, it is not a standard form, it is a procurement request. Please find more information on the Update My PO Form in the Updating a Purchase Order section.
- Access to Standard Forms depends on your user privileges.

Blanket/Standing Order

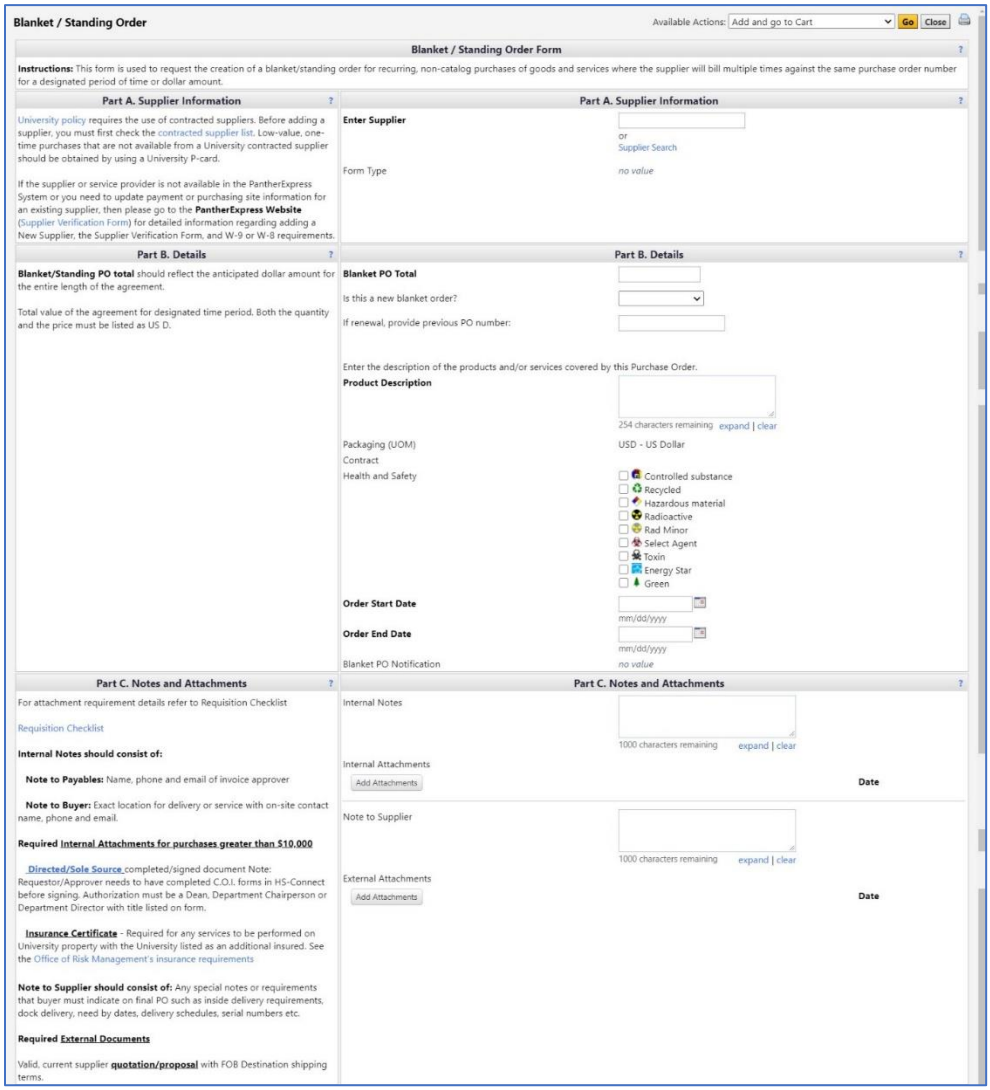
The Blanket/Standing order form allows you to request the creation of a blanket/standing order for recurring, non-catalog purchases of goods and services.

When to use

This form is used where the supplier will bill multiple times against the same purchase order number for a designated period or dollar amount.

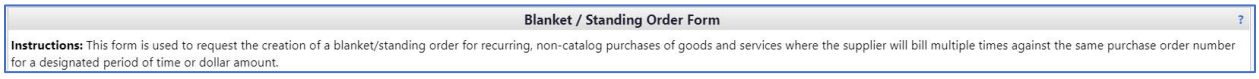
Creating a Blanket/Standing Order

The blank fields with bolded field names indicate required fields will need to be completed before the order can be submitted and processed. Fields that are not described with bold text are optional.



Instructions

The instruction panel spans both columns at the top of the form. It also provides information about when to use the form and any relevant information.



Part A – Supplier Information

Supplier: Enter the supplier's name or use the Supplier Search link below the text entry box. This field is required.

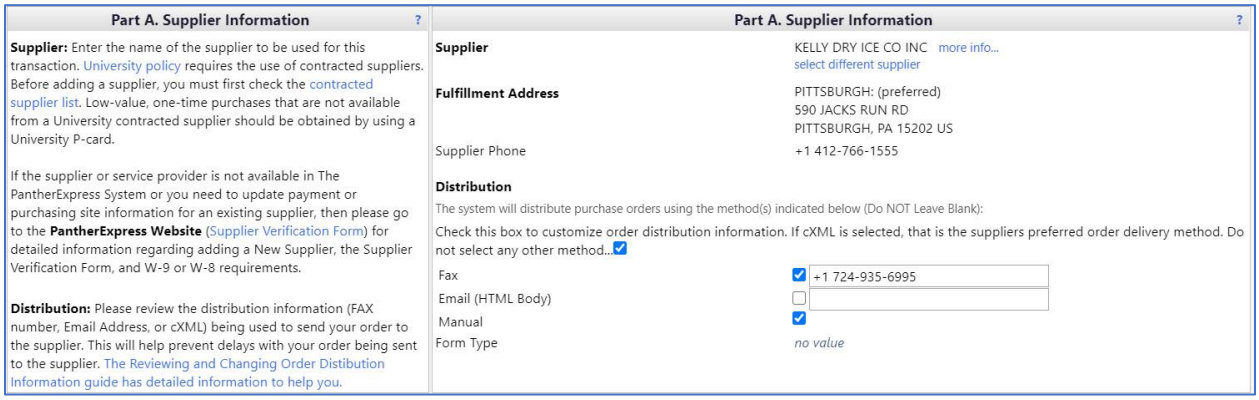
Verify that your Blanket Order has the correct order distribution information (FAX number or Email Address) to send your order to the supplier. As with all Standard Forms, the order distribution method should be reviewed before you submit your transaction for approval. This will ensure there are no delays in your order being sent to the supplier once all required approvals have been made.

Fulfillment Address: The fulfillment address is the supplier location where orders are received, processed, and filled. Most suppliers have multiple fulfillment addresses.

You can review and verify the Fulfillment Address information for your order in the Supplier Information section. The Fulfillment Address is tied to the Distribution information. To change the address, select the "select different fulfillment center" link to pull up a list of all the fulfillment addresses for the supplier.

Distribution: The Distribution information is tied to the Fulfillment Address. Each Fulfillment Address for a given supplier can have different distribution information (FAX Number or Email Address). Please review the Distribution information that is shown to ensure that the correct FAX Number or Email Address is used to send your order to the supplier. Check off the appropriate check box next to the order distribution method you need to use for your purchase order.

The left panel provides policy information, links to resources, and further information.



Part B. - Details

The Details pane is used to provide information about the order or quote. The left panel provides policy information, links to resources, and further information.

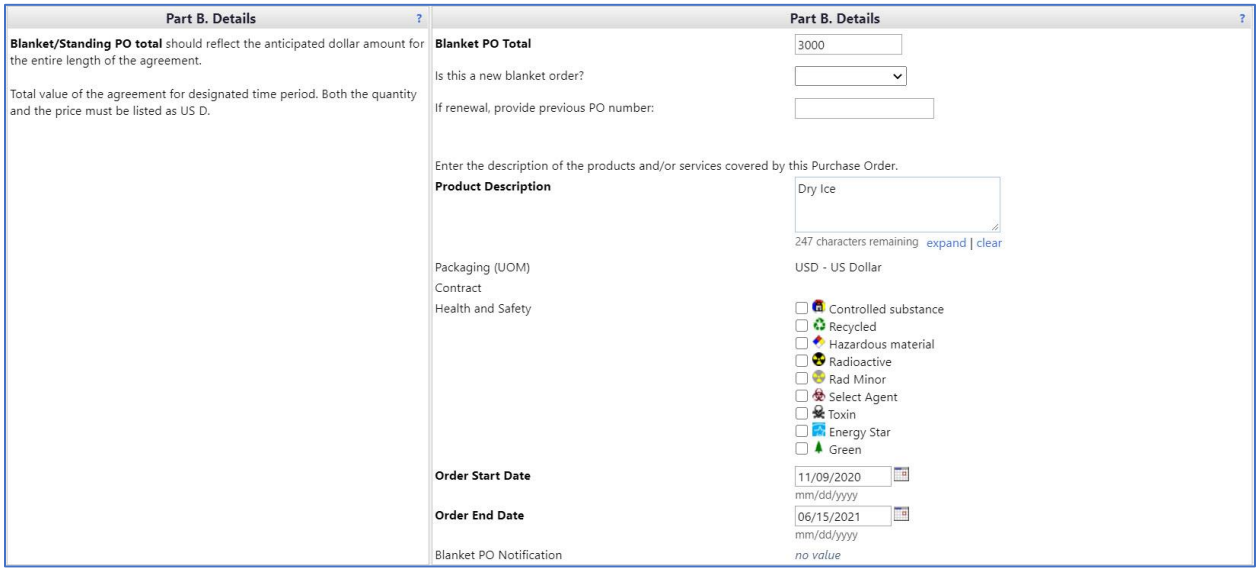
Blanket PO Total: The Blanket PO Total is required. Enter the total amount that you are planning to spend on the item being purchased, in the timeframe defined in the fields below.

Product Description: The Product Description is required. Enter a product description for the order, describing the item you are purchasing.

Order Start Date: The Order Start Date is a required field. Enter the date when the Blanket order starts. This can be today, or in the future.

Order End Date: The Order End Date is a required field. Enter the date when the Blanket order Ends. This can be today, or in the future.

Note: The Blanket Order End Date cannot go over the Fiscal Year End.



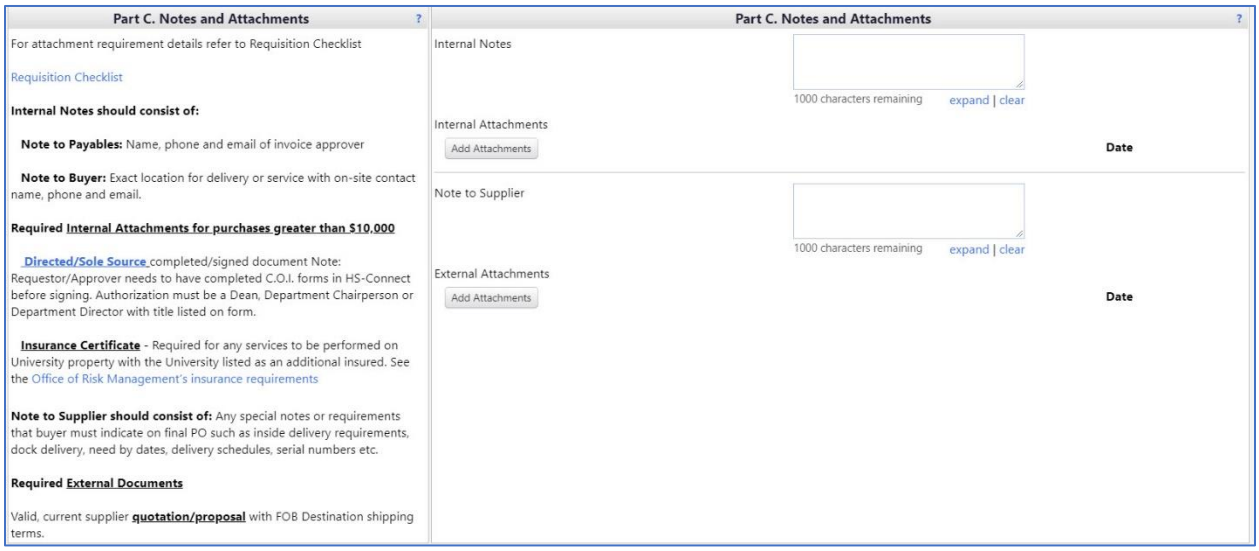
Part C – Notes and Attachments

If the total order is less than $10,000, this section of the form is optional; however, it is best practice to attach the details related to your supplier quote using the Add Attachments button.

If the supplier requires a copy of your quote to be sent along with your purchase order, use the Add Attachments button under External Attachments to ensure your supplier will receive this.

If your quote or order is more than $10,000, Purchasing Services requires a copy of the supplier quote. Purchasing Services sees both internal and external attachments; please only upload the quote once and use the appropriate button relative to your supplier (External Attachments go to the supplier).

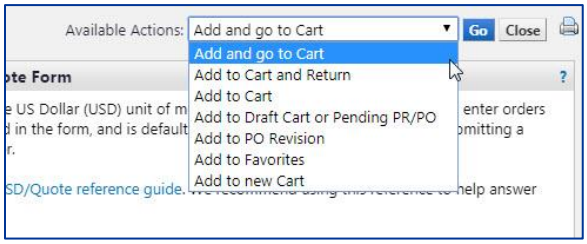
For orders over $10,000, you should also reference the Requisition Check List to see what additional supporting documentation is needed.



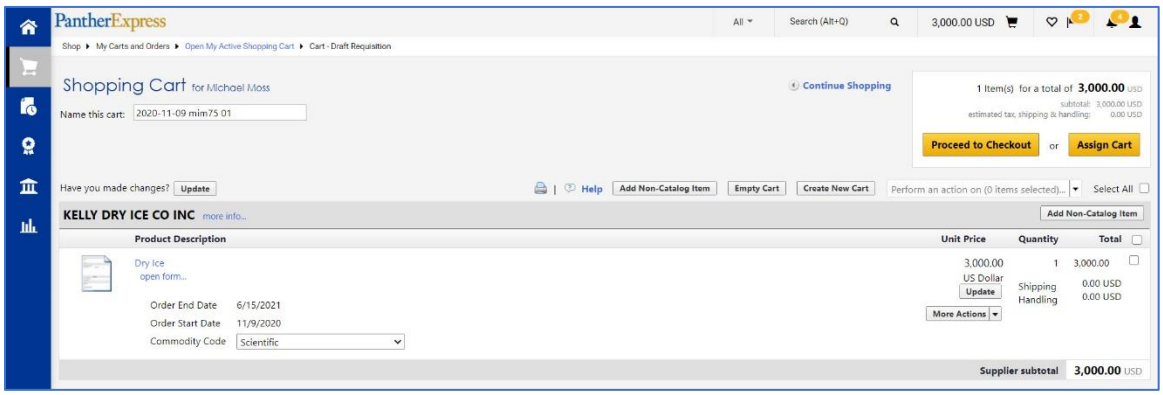
Submit

Once the form is completed, select the appropriate action form the Available Actions menu:

- Use the “Add and go to Cart” action to add the form to your active cart
- Use the “Add to Cart and Return” to add additional lines.

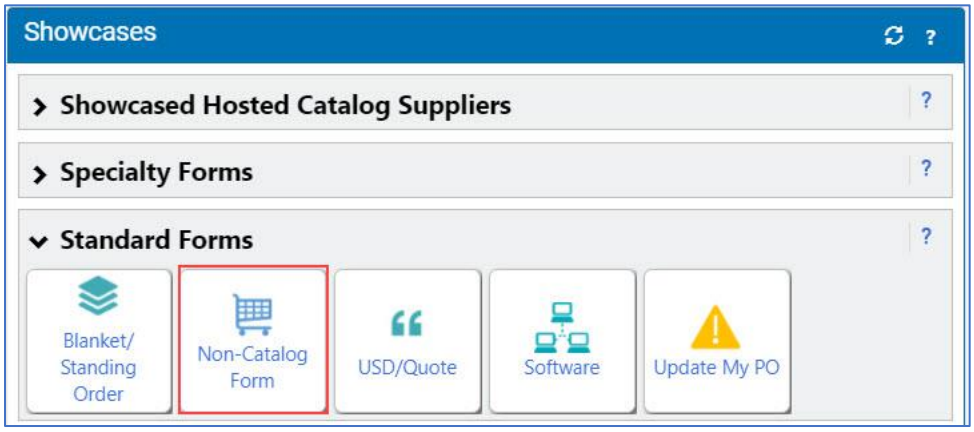


Once your form is in the cart, proceed to the Cart Management, then to the Checkout processes (See the relevant chapters for details).



Non-Catalog Form

The Non-Catalog form allows you to enter orders for Non-catalog suppliers and allows exception entries for all suppliers.



When to use

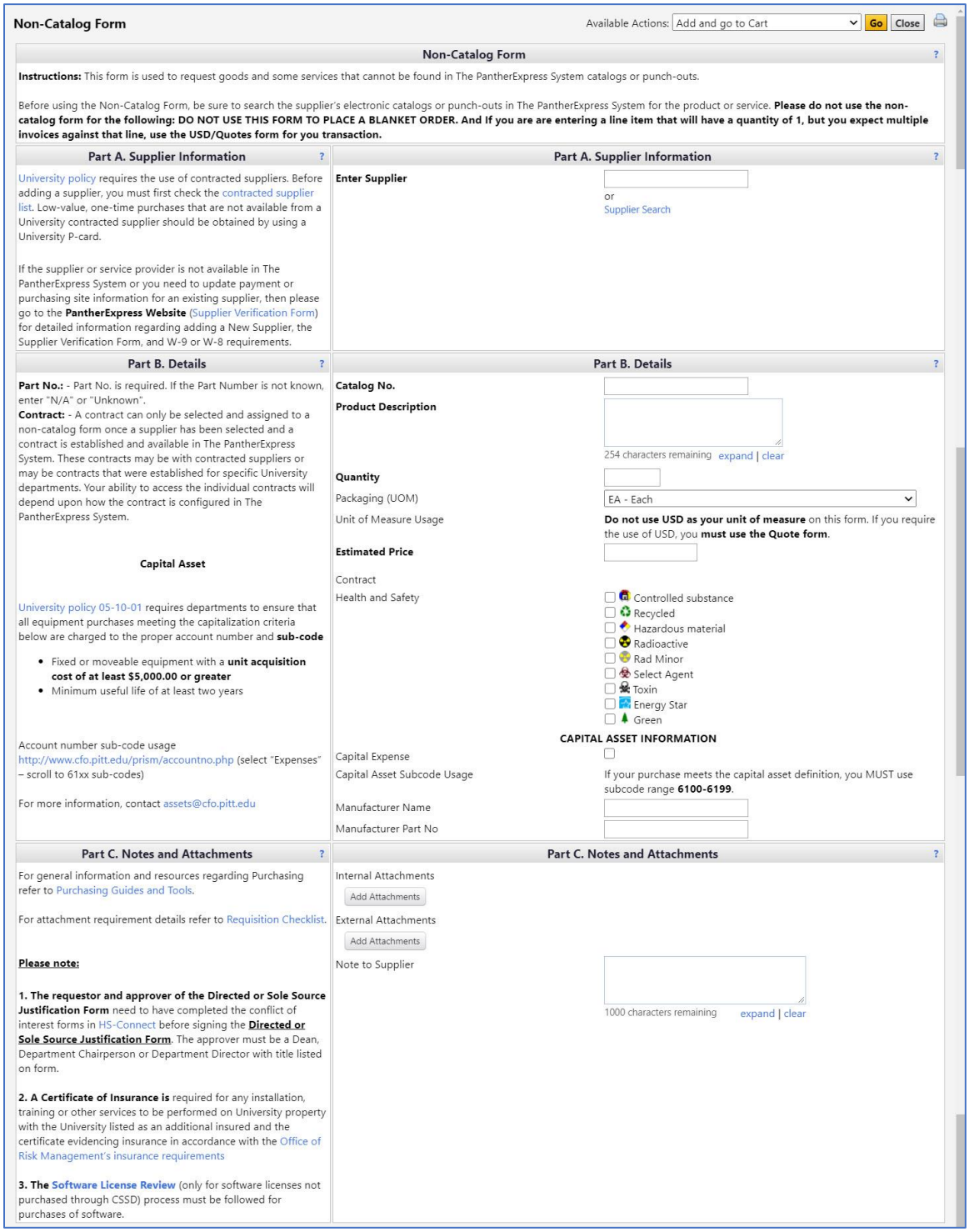
This form is used to request goods that cannot be found in The PantherExpress System catalogs or punchouts.

Before using the Non-Catalog Form, be sure to search the supplier's electronic catalogs or punchouts in The PantherExpress System for the product or service.

Note: The Non-Catalog order cannot be used to place orders with USD as the unit of measure. Please use the USF/Quote form for those purchase types.

Creating a Non-Catalog Purchase Order

The blank fields with bolded field names indicat~~ed~~ required fields that will need to be completed before the order can be submitted and processed. Fields that are not described with bold text are optional.



Non-Catalog Form

Available Actions: Add and go to Cart Go Close

Non-Catalog Form

Instructions: This form is used to request goods and some services that cannot be found in The PantherExpress System catalogs or punch-outs.

Before using the Non-Catalog Form, be sure to search the supplier's electronic catalogs or punch-outs in The PantherExpress System for the product or service. **Please do not use the non-catalog form for the following: DO NOT USE THIS FORM TO PLACE A BLANKET ORDER. And If you are are entering a line item that will have a quantity of 1, but you expect multiple invoices against that line, use the USD/Quotes form for you transaction.**

Part A. Supplier Information

University policy requires the use of contracted suppliers. Before adding a supplier, you must first check the contracted supplier list. Low-value, one-time purchases that are not available from a University contracted supplier should be obtained by using a University P-card.

If the supplier or service provider is not available in The PantherExpress System or you need to update payment or purchasing site information for an existing supplier, then please go to the **PantherExpress Website** (Supplier Verification Form) for detailed information regarding adding a New Supplier, the Supplier Verification Form, and W-9 or W-8 requirements.

Part A. Supplier Information

Enter Supplier

or

Supplier Search

Part B. Details

Part No.: - Part No. is required. If the Part Number is not known, enter "N/A" or "Unknown".
Contract: - A contract can only be selected and assigned to a non-catalog form once a supplier has been selected and a contract is established and available in The PantherExpress System. These contracts may be with contracted suppliers or may be contracts that were established for specific University departments. Your ability to access the individual contracts will depend upon how the contract is configured in The PantherExpress System.

Capital Asset

University policy 05-10-01 requires departments to ensure that all equipment purchases meeting the capitalization criteria below are charged to the proper account number and **sub-code**

- Fixed or moveable equipment with a **unit acquisition cost of at least $5,000.00 or greater**
- Minimum useful life of at least two years

Account number sub-code usage
http://www.cfo.pitt.edu/prism/accountno.php (select "Expenses" – scroll to 61xx sub-codes)

For more information, contact assets@cfo.pitt.edu

Part B. Details

Catalog No.

Product Description

254 characters remaining expand | clear

Quantity

Packaging (UOM) EA - Each

Unit of Measure Usage **Do not use USD as your unit of measure** on this form. If you require the use of USD, you **must use the Quote form**.

Estimated Price

Contract

Health and Safety
- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Rad Minor
- Select Agent
- Toxin
- Energy Star
- Green

CAPITAL ASSET INFORMATION

Capital Expense

Capital Asset Subcode Usage If your purchase meets the capital asset definition, you MUST use subcode range **6100-6199**.

Manufacturer Name

Manufacturer Part No

Part C. Notes and Attachments

For general information and resources regarding Purchasing refer to Purchasing Guides and Tools.

For attachment requirement details refer to Requisition Checklist.

Please note:

1. The requestor and approver of the Directed or Sole Source Justification Form need to have completed the conflict of interest forms in HS-Connect before signing the **Directed or Sole Source Justification Form**. The approver must be a Dean, Department Chairperson or Department Director with title listed on form.

2. A Certificate of Insurance is required for any installation, training or other services to be performed on University property with the University listed as an additional insured and the certificate evidencing insurance in accordance with the Office of Risk Management's insurance requirements

3. The Software License Review (only for software licenses not purchased through CSSD) process must be followed for purchases of software.

Part C. Notes and Attachments

Internal Attachments

Add Attachments

External Attachments

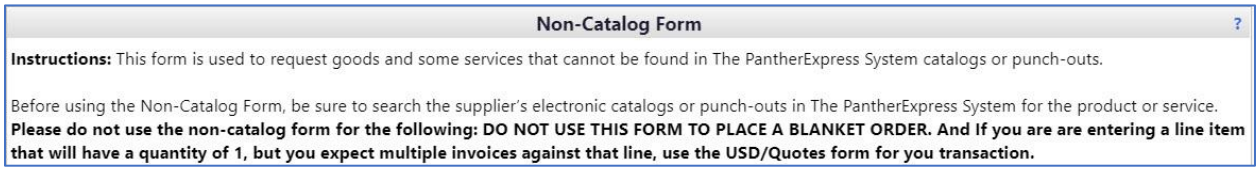
Add Attachments

Note to Supplier

1000 characters remaining expand | clear

Instructions

The instruction panel spans both columns at the top of the form. It also provides information about when to use the form and any relevant information. Pay particular attention to the bold, all-caps note in the instructions, which reads, “Do not use this form to enter a blanket order.”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Part A. Supplier Information ?

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Part A. Supplier Information ?

Supplier	B&B MICROSCOPES more info... select different supplier
Fulfillment Address	PITTSBURGH: (preferred) 490 LOWRIES RUN RD PITTSBURGH, PA 15237 US
Supplier Phone	+1

Distribution (Do NOT Leave Blank)

The system will distribute purchase orders using the method(s) indicated below (Do NOT Leave Blank):

Check this box to customize order distribution information. If cXML is selected, that is the suppliers preferred order delivery method. Do not select any other method...☑

Fax	☑	+1 877-768-1984
Email (HTML Body)	☐	
Manual	☐	

Part B. - Details

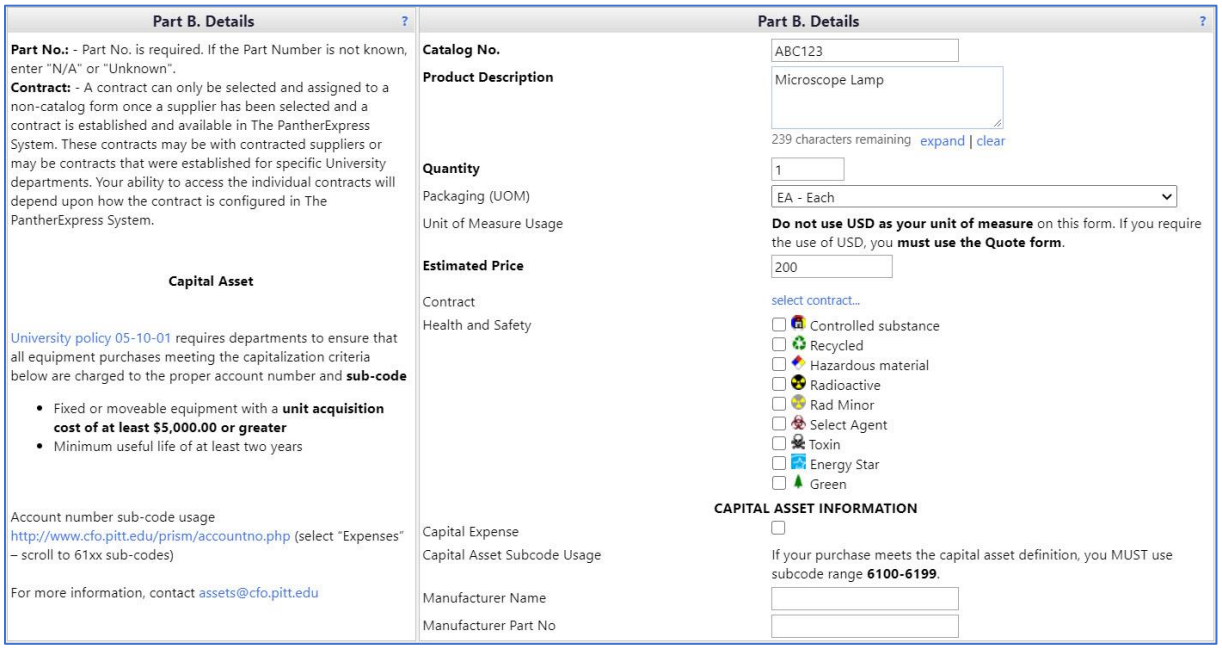
The Details pane is used to provide information about the order or quote. The left panel provides policy information, links to resources, and further information.

Catalog No: Catalog No. is a required field. If you do not have a catalog or item number, you must still enter “N/A” or “Unknown.”

Product Description: The Product Description is required. Enter a product description for each of the lines, describing the item you are purchasing.

Estimated Price: The Estimated Price is a required field. You should enter the total price per unit of measure for the item.

Note: **Do not use USD** as your unit of measure on the Non-Catalog form. If you require the use of USD, you must use the USD/Quote Form



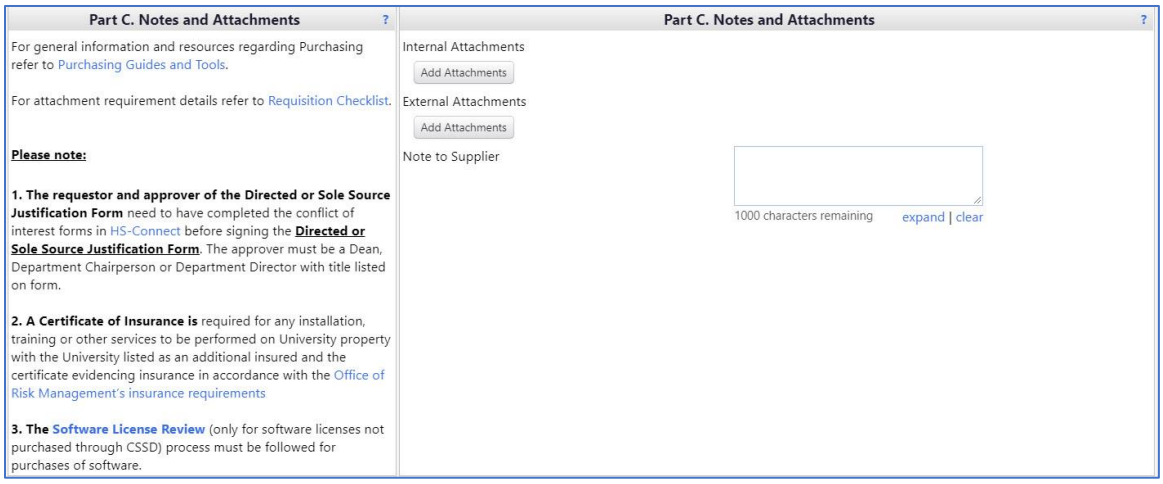
Part C – Notes and Attachments

If the total order is less than $10,000, this section of the form is optional; however, it is best practice to attach the details related to your supplier quote using the Add Attachments button.

If the supplier requires a copy of your quote to be sent along with your purchase order, use the Add Attachments button under External Attachments to ensure your supplier will receive this.

If your quote or order is more than $10,000, Purchasing Services requires a copy of the supplier quote. Purchasing Services sees both internal and external attachments; please only upload the quote once and use the appropriate button relative to your supplier (External Attachments go to the supplier).

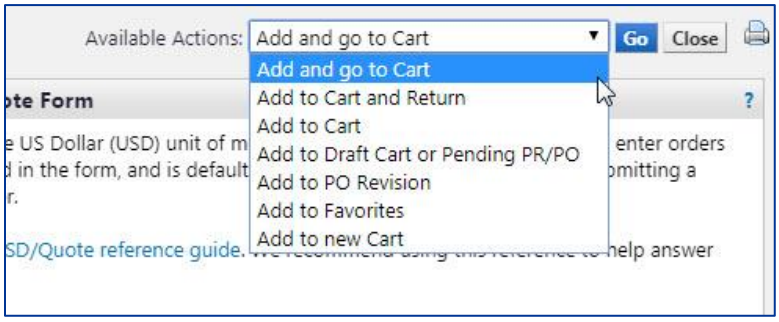
For orders over $10,000, you should also reference the Requisition Check List to see what additional supporting documentation is needed.



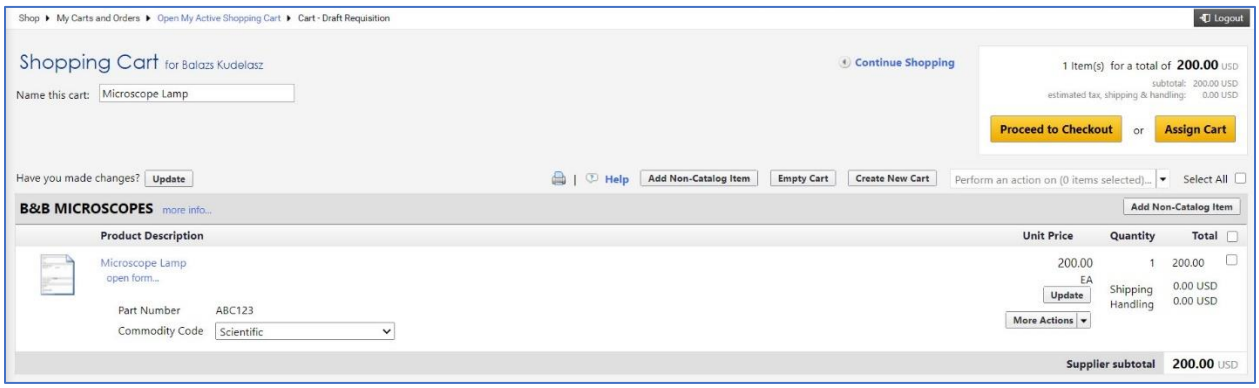
Submit

Once the form is completed, select the appropriate action from the Available Actions menu:

- Use the “Add and go to Cart” action to add the form to your active cart.
- Use the “Add to Cart and Return” to add additional lines.



Once your form is in the cart, proceed to the Cart Management, then to the Checkout processes (See the relevant chapters for details).



USD/Quote Form

A USD/Quote form allows PantherExpress users to enter orders and quotes for single-quantity, non-catalog items at a fixed amount using US Dollar (USD) as the unit of measure.

When to use

- USD Orders

The USD/Quotes form should be used whenever a buyer needs to place an order using USD as the unit of measure. The USD measure indicates the total price for the line and is used to ensure there are no invoice discrepancies with the line. USD orders must have a quantity of one (1) item; this setting is programmed into the form and cannot be changed.

Example: You are placing an order for a single-quantity item that will be paid across multiple invoices, such as a purchase that requires a down payment or installment payment.

- Quotes

The USD/Quotes form should also be used to enter orders based on a quote from a supplier. The form can be used for both single and multi-line quotes. It is best practice to attach a PDF or Word copy of the quote you received from the supplier to your order.

Example: You are outfitting a new, start-up lab and will be receiving a multi-line-item quote from a lab furniture supplier.

  - Quotes with Less Than Three Lines

If you obtain a quote that contains three or fewer line items, please enter in each line item.

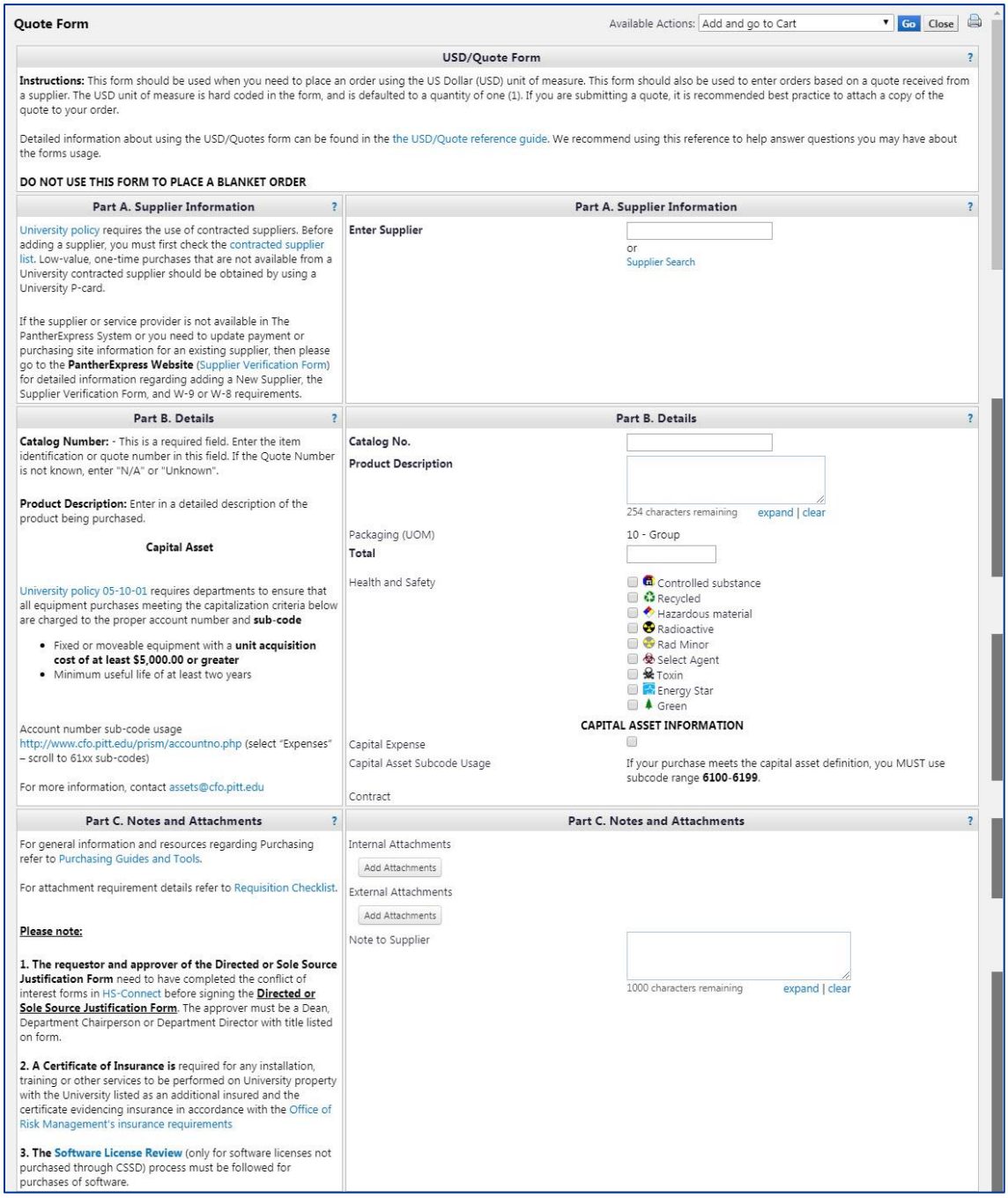
- Quotes with More Than Three Lines

If your quote has more than three-line items, you may combine all the lines into one. We recommend, however, that you enter all the line items associated with your quote separately.

Creating a USD/Quote Purchase Order

The USD/Quote form is similar in layout and appearance to the other Standard Forms that appear in the PantherExpress System.

The blank fields with bolded field names indicate required fields that will need to be completed before the order can be submitted and processed. Fields that are not described with bold text are optional.



Instructions

The instruction panel spans both columns at the top of the form. It also provides information about when to use the form and any relevant information. Pay particular attention to the bold, all-caps note in the instructions, which reads, “Do not use this form to enter a blanket order.”

Part A - Supplier Information

Supplier: Enter the supplier name or use the Supplier Search link below the text entry box. This field is required.

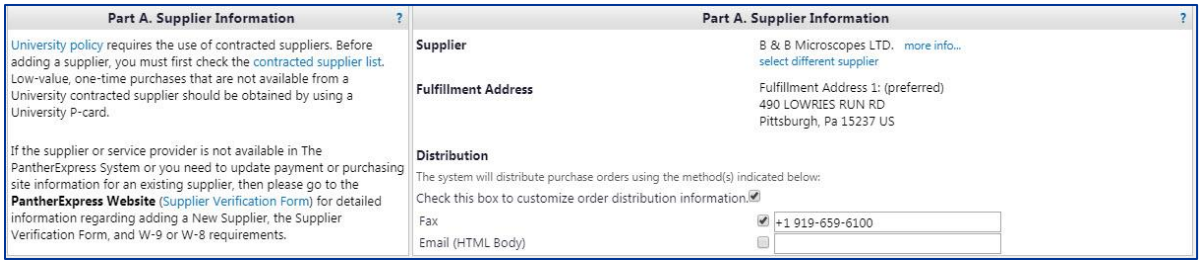
Verify that your USD/Quote form has the correct order distribution information (FAX number or Email Address) to send your order to the supplier. As with all Standard Forms, the order distribution method should be reviewed before you submit your transaction for approval. This will ensure there are no delays in your order being sent to the supplier once all required approvals have been made.

Fulfillment Address: The fulfillment address is the supplier location where orders are received, processed, and filled. Most suppliers have multiple fulfillment addresses.

You can review and verify the Fulfillment Address information for your order in the Supplier Information section. The Fulfillment Address is tied to the Distribution information. To change the address, select the “select different fulfillment center” link to pull up a list of all the fulfillment addresses for the supplier.

Distribution: The Distribution information is tied to the Fulfillment Address. Each Fulfillment Address for a given supplier can have different distribution information (FAX Number or Email Address). Please review the Distribution information that is shown to ensure that the correct FAX Number or Email Address is used to send your order to the supplier. Check the appropriate check box next to the order distribution method you need to use for your purchase order.

The left panel provides policy information, links to resources, and further information.



Part B - Details

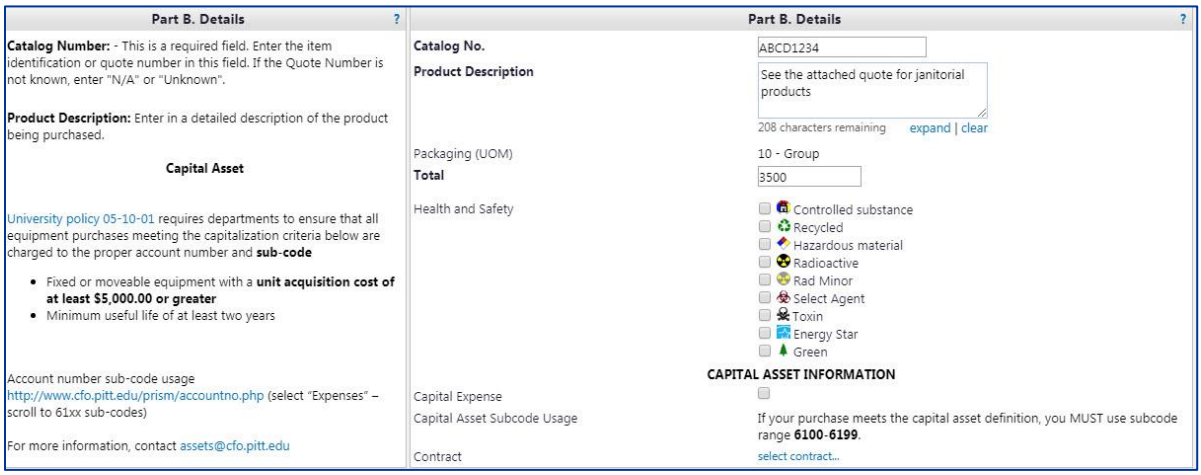
The Details pane is used to provide information about the order or quote. The left panel provides policy information, links to resources, and further information.

Catalog No: Catalog No. is a required field. If you do not have a catalog or item number, you must still enter “N/A” or “Unknown.” If you have a quote with three or fewer line items, you should enter in a separate Catalog No. for each line item you add to the shopping cart. If you have a quote with more than three lines, you may choose to summarize the quote using just one line item by entering a general description, such as “Quote,” into the text field.

Product Description: The Product Description is required. If you have a quote with three or fewer line items, you should enter a product description for each of the lines. If you have a quote with more than three lines, you can enter “As per the attached quote” with a description of what is being ordered.

Example: “See the attached quote for janitorial products.”

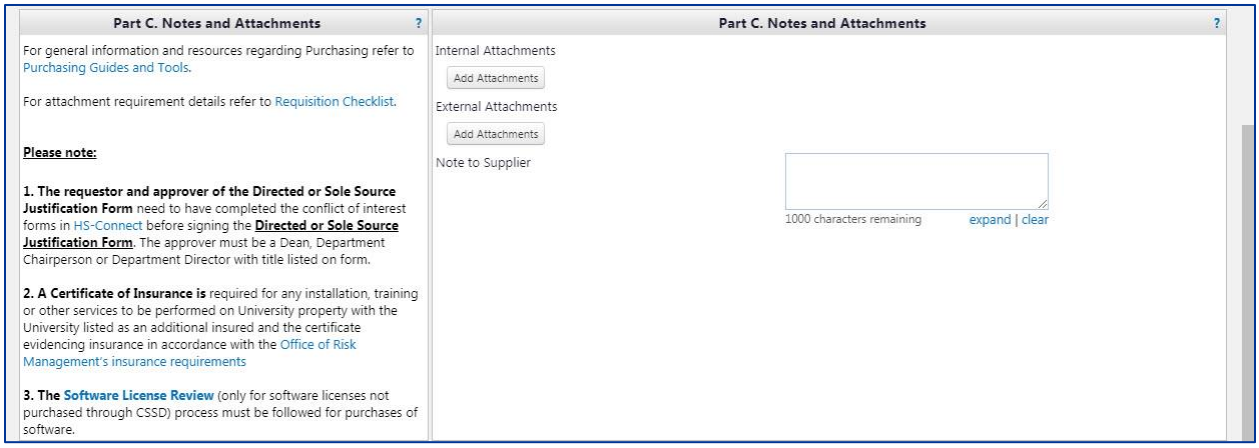
Total: The Total is a required field. You should enter the total cost of the order. If you have just one line, this is the total cost of the line. If you are summarizing a multi-line quote or order, you should enter in the full dollar amount of the quote or order.



Part C – Notes and Attachments

If the total order is less than $10,000, this section of the form is optional; however, it is best practice to attach the details related to your supplier quote using the Add Attachments button. ~~A~~ If the supplier requires a copy of your quote to be sent along with your purchase order, use the Add Attachments button under External Attachments to ensure your supplier will receive this.

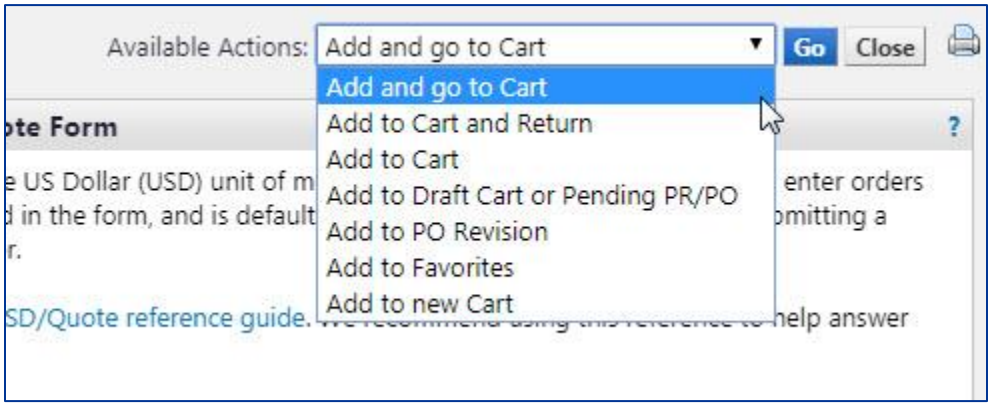
If your quote or order is more than $10,000, Purchasing Services requires a copy of the supplier quote. Purchasing Services sees both internal and external attachments; please only upload the quote once and use the appropriate button relative to your supplier (External Attachments go to the supplier). For orders over $10,000, you should also reference the Requisition Checklist to see what additional supporting documentation is needed.



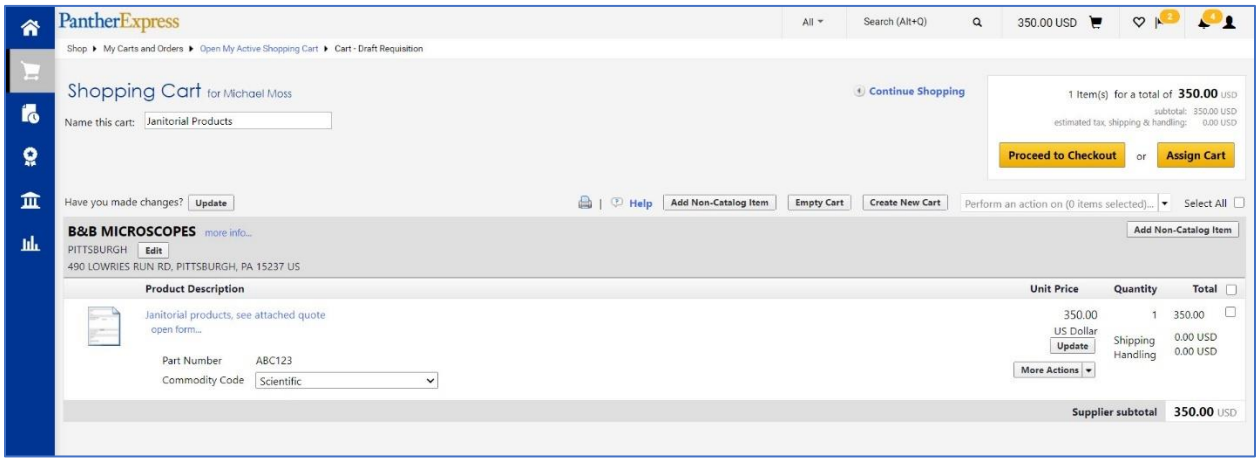
Submit

Once the form is completed, select the appropriate action form the Available Actions menu:

- Use the “Add and go to Cart” action to add the form to your active cart
- Use the “Add to Cart and Return” to add additional lines.

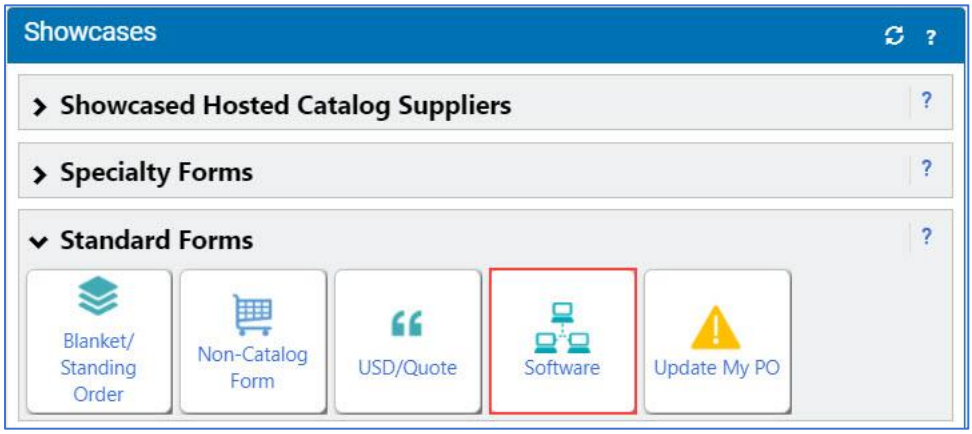


Once your form is in the cart, proceed to the Cart Management to complete the Checkout processes (See the Checkout chapter for details).



Software Form

The Software form allows you to enter orders for software suppliers, as a backup method for software purchase.



The following methods should be used for software purchase:

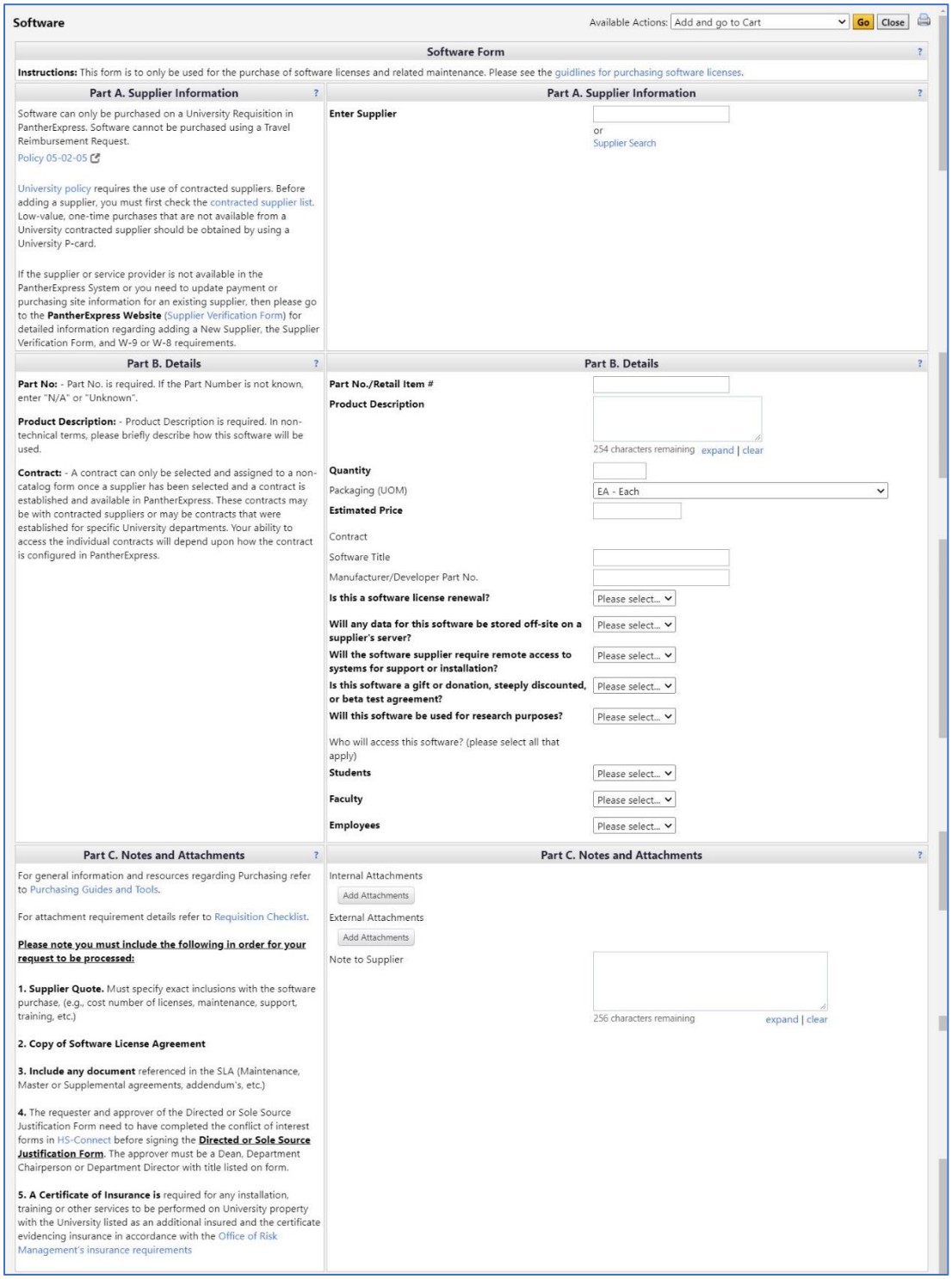
1. Pitt IT Software Store
2. Other Contracted vendors
3. Using a P-card (after online training completion)
4. Using the Software form

When to use

This form is used to request the purchase of Software only if the methods above are not available.

Creating a Software Form

The blank fields with bolded field names indicated required fields that will need to be completed before the order can be submitted and processed. Fields that are not described with bold text are optional.



Instructions

The instruction panel spans both columns at the top of the form. It also provides information about when to use the form and any relevant information.

Part A – Supplier Information

Supplier: Enter the supplier name or use the Supplier Search link below the text entry box. This field is required.

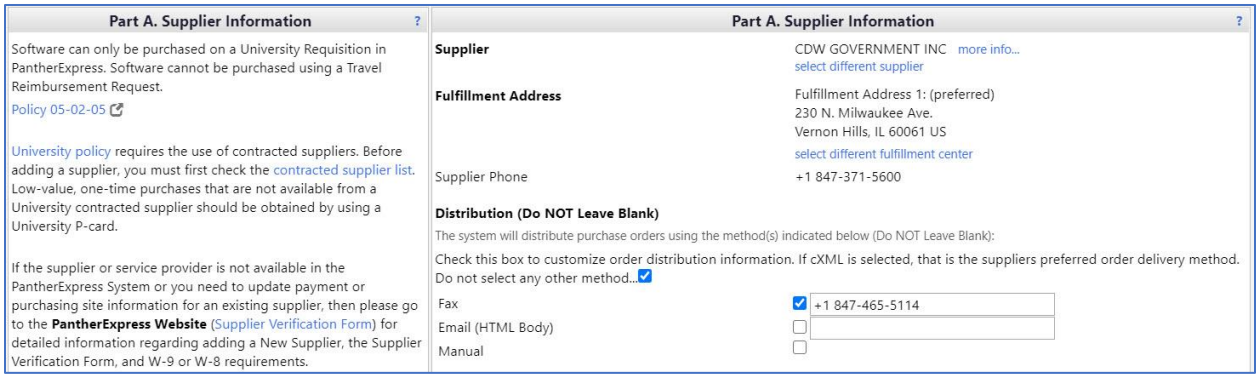
Verify that your Software Form has the correct order distribution information (FAX number or Email Address) to send your order to the supplier. As with all Standard Forms, the order distribution method should be reviewed before you submit your transaction for approval. This will ensure there are no delays in your order being sent to the supplier once all required approvals have been made.

Fulfillment Address: The fulfillment address is the supplier location where orders are received, processed, and filled. Most suppliers have multiple fulfillment addresses.

You can review and verify the Fulfillment Address information for your order in the Supplier Information section. The Fulfillment Address is tied to the Distribution information. To change the address, select the "select different fulfillment center" link to pull up a list of all the fulfillment addresses for the supplier.

Distribution: The Distribution information is tied to the Fulfillment Address. Each Fulfillment Address for a given supplier can have different distribution information (FAX Number or Email Address). Please review the Distribution information that is shown to ensure that the correct FAX Number or Email Address is used to send your order to the supplier. Check the appropriate check box next to the order distribution method you need to use for your purchase order.

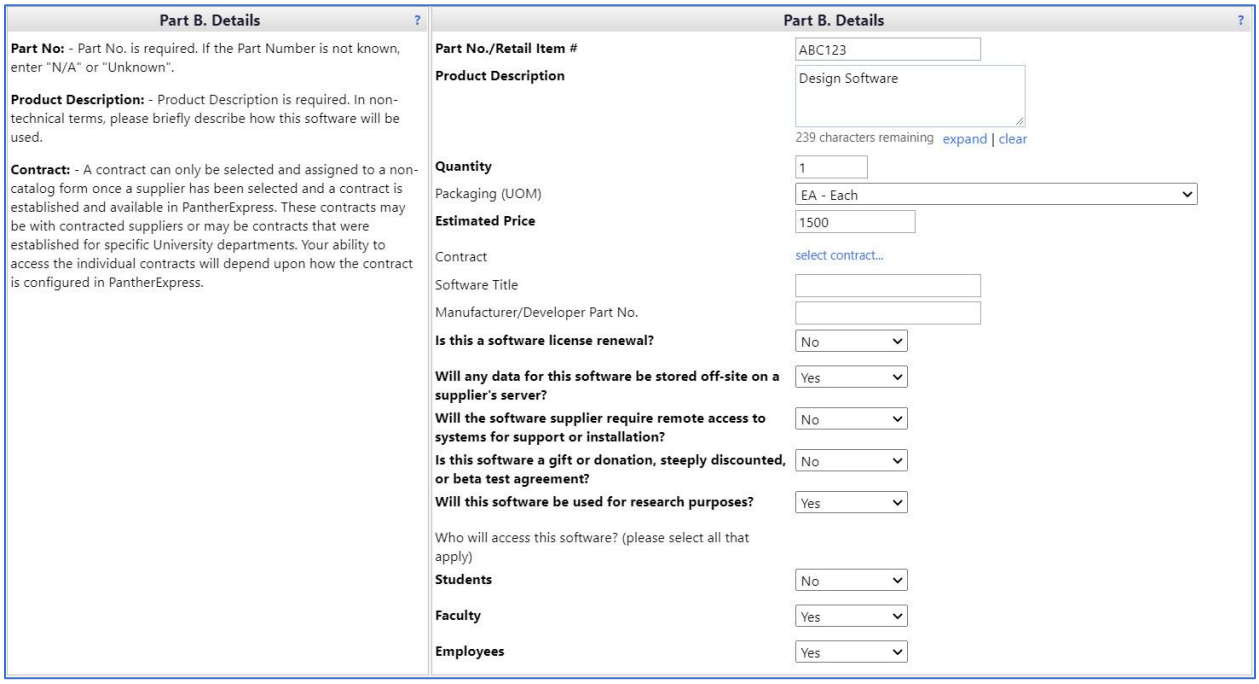
The left panel provides policy information, links to resources, and further information.



Part B. - Details

The Details pane is used to provide information about the order or quote. The left panel provides policy information, links to resources, and further information.

Fill out all required fields, marked with Bold.



Part C – Notes and Attachments

If the total order is less than $10,000, this section of the form is optional; however, it is best practice to attach the details related to your supplier quote using the Add Attachments button.

If the supplier requires a copy of your quote to be sent along with your purchase order, use the Add Attachments button under External Attachments to ensure your supplier will receive this.

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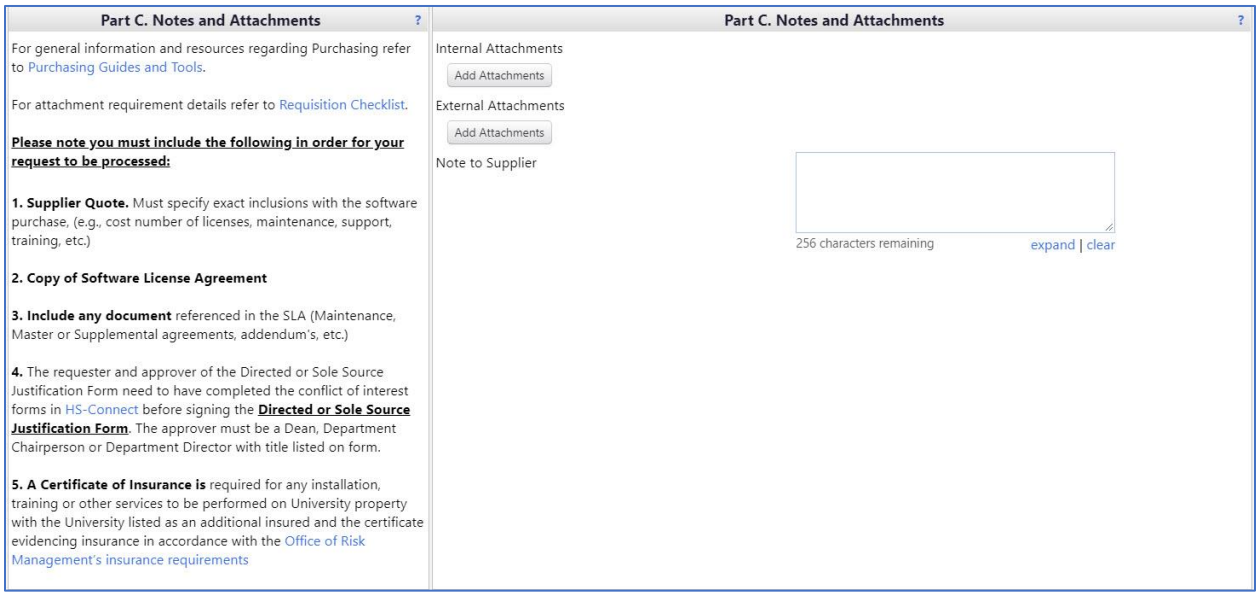
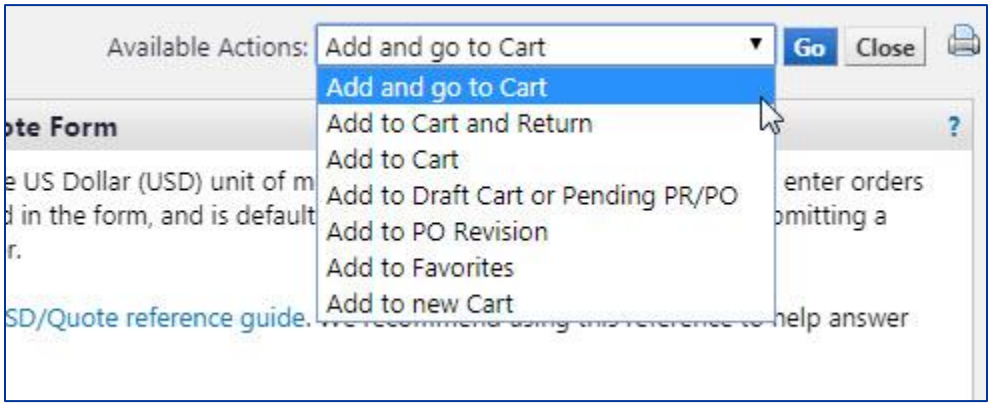
For orders over $10,000, you should also reference the Requisition Check List to see what additional supporting documentation is needed.



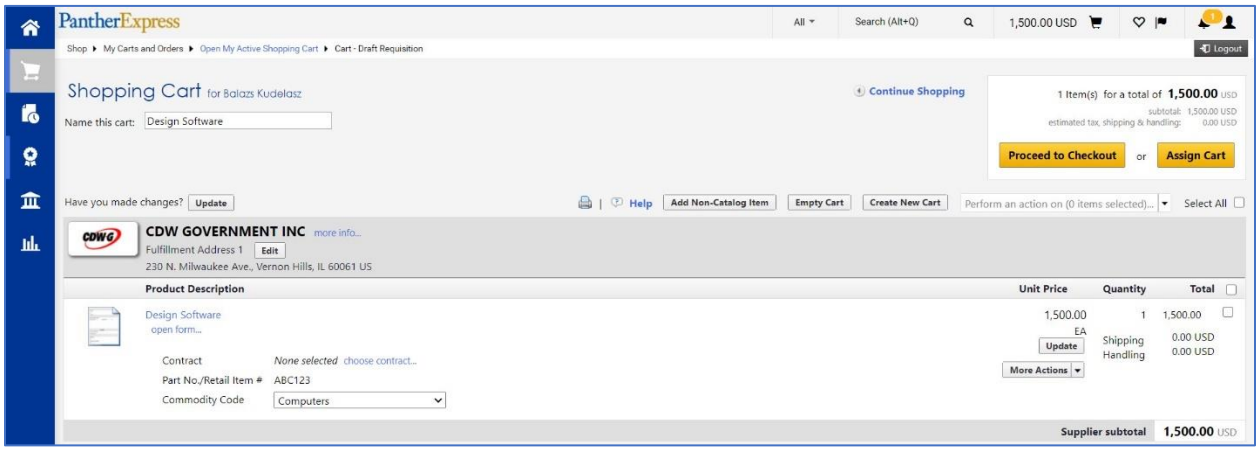
Submit

Once the form is completed, select the appropriate action from the Available Actions menu:

- Use the “Add and go to Cart” action to add the form to your active cart.
- Use the “Add to Cart and Return” to add additional lines.



Once your form is in the cart, proceed to the Cart Management, then to the Checkout processes (See the relevant chapters for details).

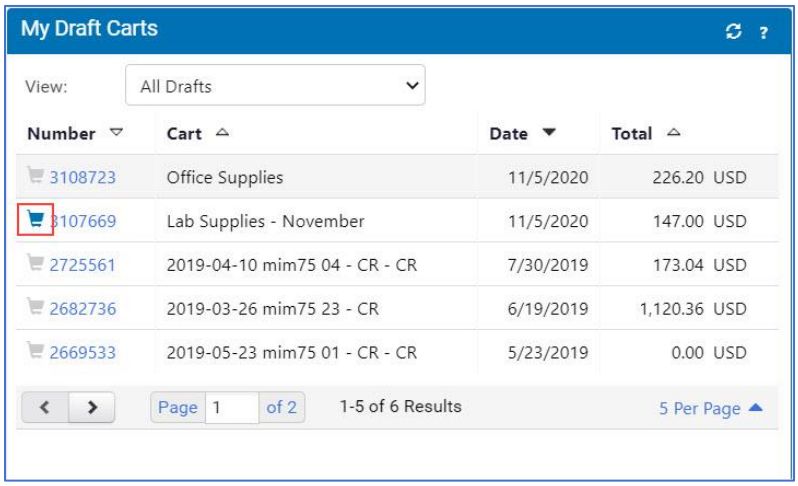


Managing Carts

In PantherExpress system, you are going to see two types of Carts, Draft carts and Assigned carts. All created carts, both Draft and Assigned, will be saved automatically, however, changes made to the contents of the carts will have to be saved manually.

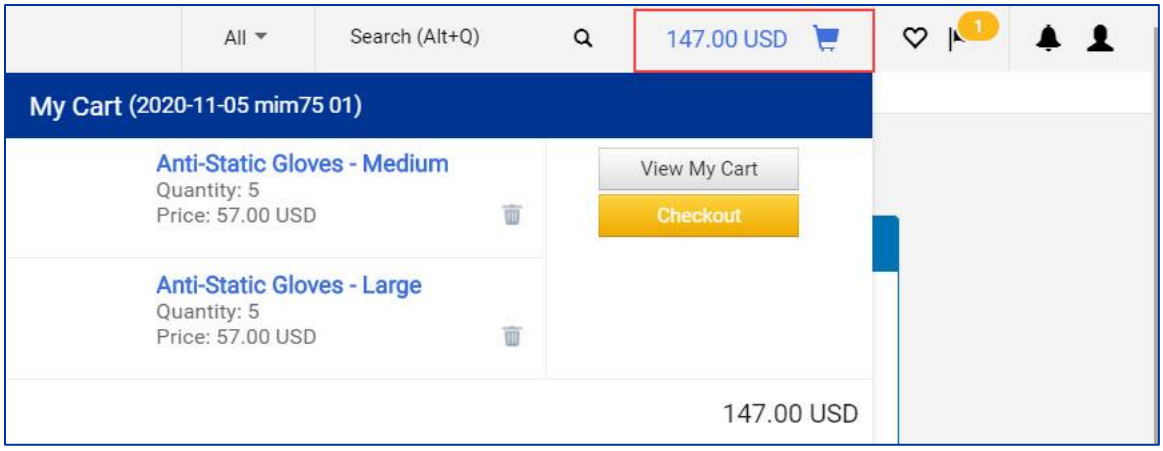
One of the Draft carts will be the Active Cart, this is the cart that you can access from the Shopping Dashboard. You select any Draft Cart to become the Active cart. In order to purchase items in a cart, you will have to “activate” it.

The Draft Carts will also be displayed on the Shopping Dashboard. The Active cart will be marked with a filled shopping cart icon.



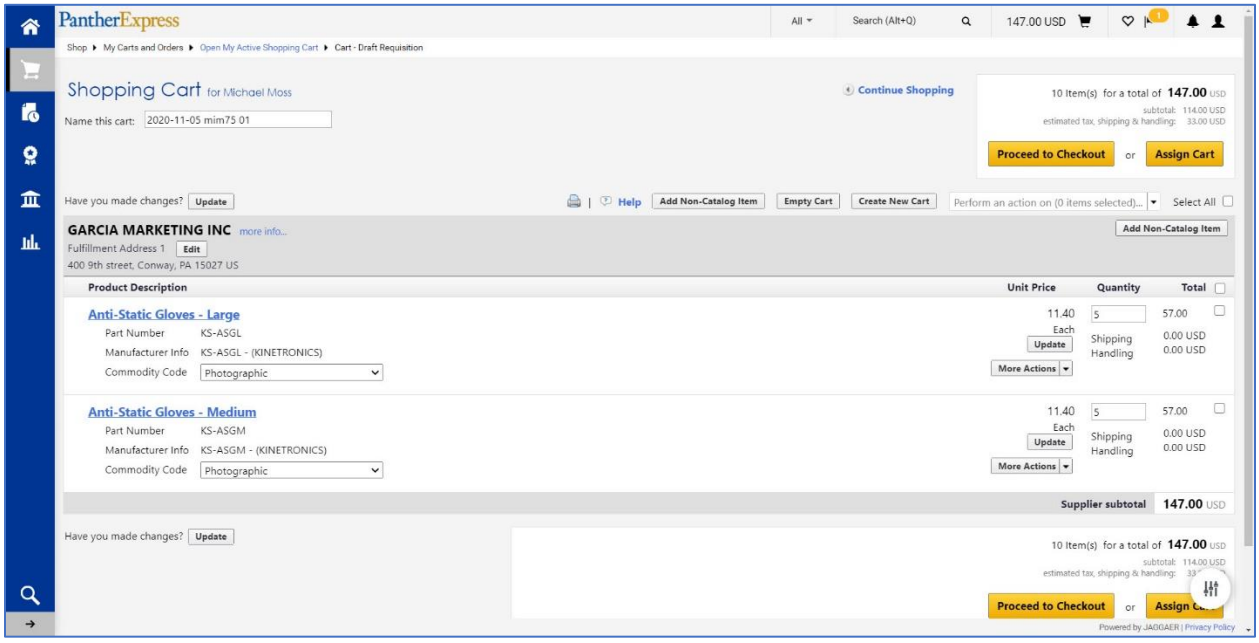
Active Cart

You can access the Active Cart from the Shopping dashboard.



Here you will find shortcuts to Delete items by selecting the trash can icon on each line, you can go directly to Checkout, or you can select View My Cart.

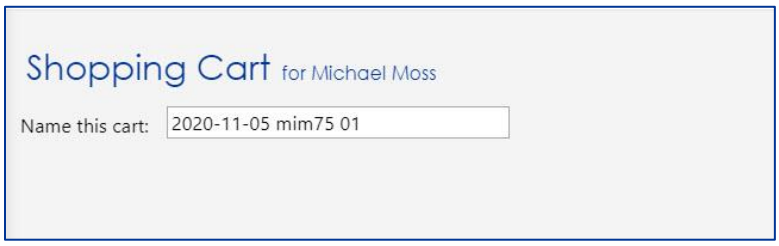
Note: To purchase the contents of the cart, the cart cannot contain items from more than one supplier.



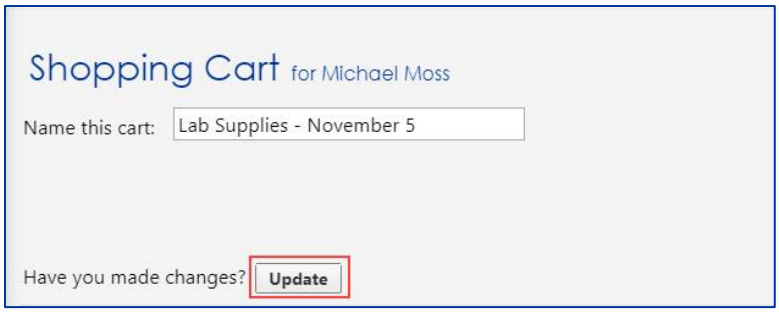
Updating Carts

On the active cart page, we can make several updates. Note: Don't forget to select the Update button after making any changes to your cart.

- Cart name: The default name of a cart is the date the cart was created, the username of the person who created it, and a sequence number, in case an individual creates more than one cart.

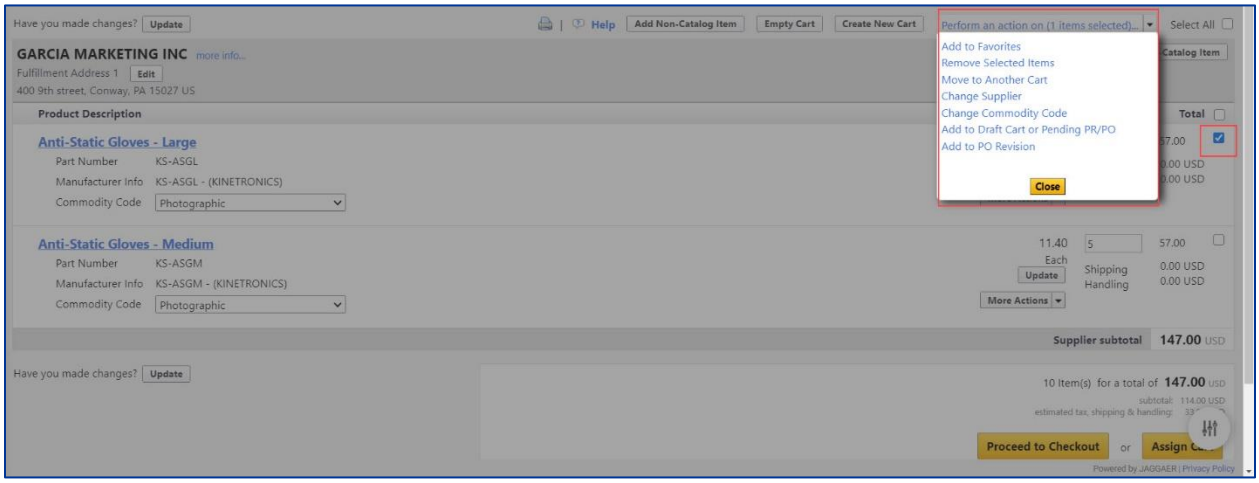


- To change the name of your cart, click into the Name this cart field, enter the new name, then select update. Custom cart names will allow you to identify the cart easier, if you are planning to complete your purchase later.

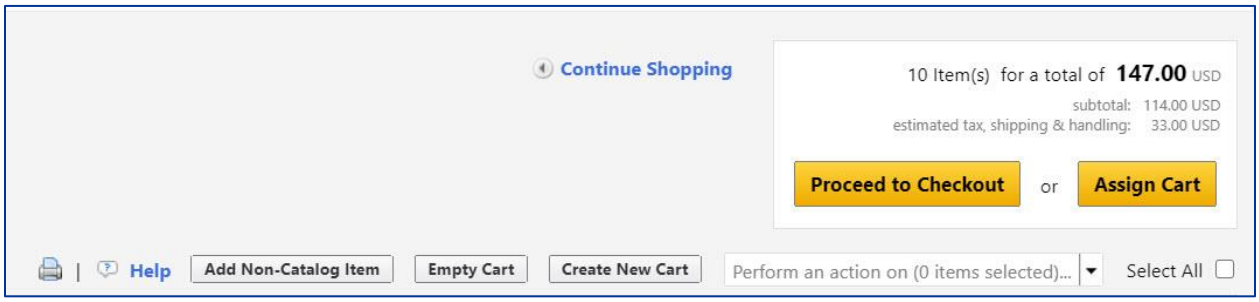


- You can update the Quantity of each line by editing the value in the Quantity field.

- To remove a line completely, select the check box at the end of a line, then select the Perform an action on... dropdown, then select Remove the Selected items. Please note the other actions you can perform on the selected item.

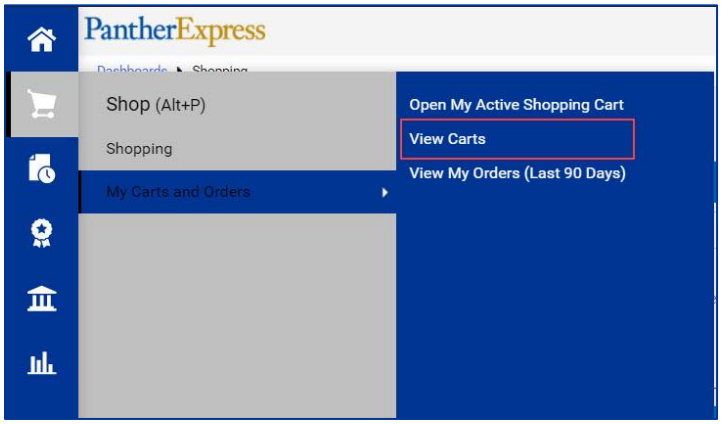


- Using the available options in the top right section, you can progress in the purchasing process. You can:
  - Continue Shopping, selecting this option will return you to the Shopping Dashboard
  - Empty Cart, selecting this option will remove all items form your cart.
  - Create New Cart, this option will create a new cart, and automatically make it the Active Cart.
  - Assign Cart will allow you assign your cart to any buyer in the system. You will be able to track the process of active cart in the Carts menu.
  - Finally, you can Proceed to Checkout to continue creating the Requisition.



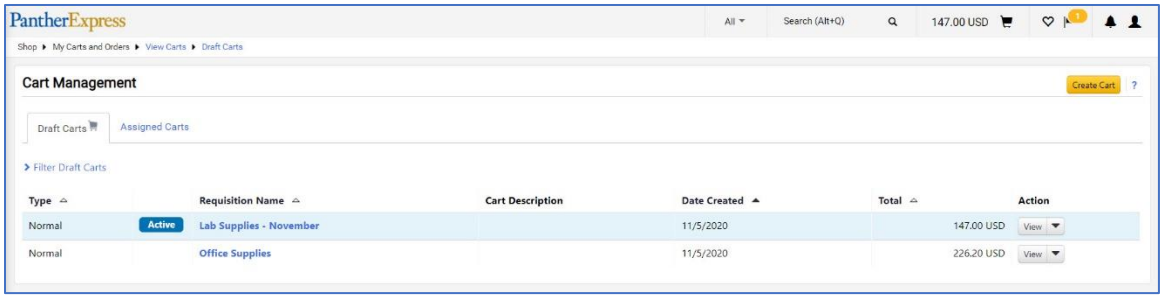
Cart Management

Draft and Assigned Carts can be accessed in the Shop Main Menu, My Carts and Orders, View Carts.

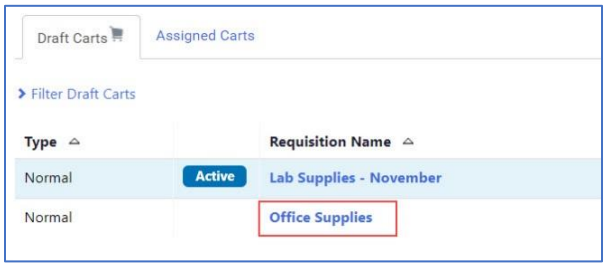


Draft Carts

Draft Carts are carts that have been created, but they have not been ordered yet. The Active Cart will also be in this list.



To select any other cart, select the Requisition name – the name of your cart- and that cart will become the Draft Cart.



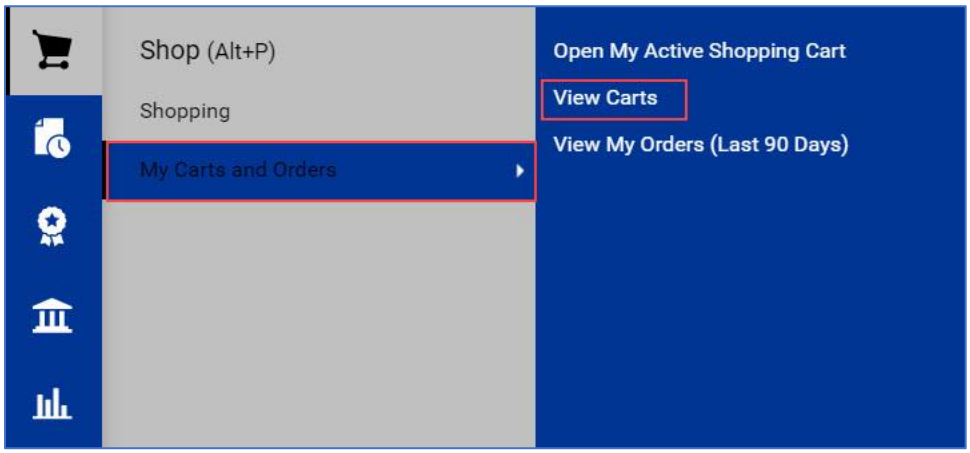
Returned Carts

Requisitions that were submitted with an invalid account code will automatically be returned with the label Returned. A returned requisition will become a draft cart, again.

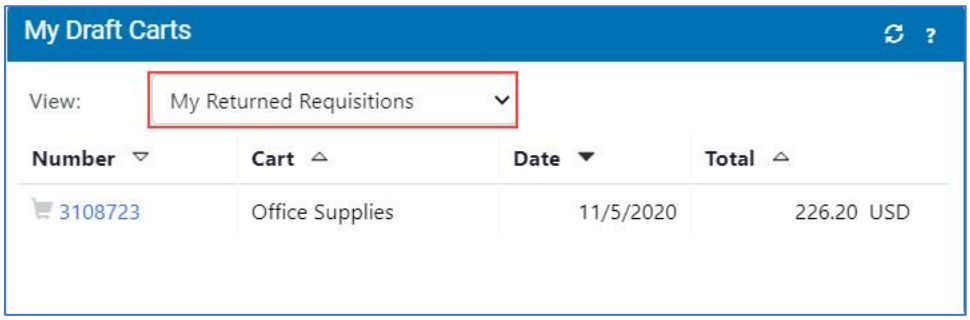
Note: Refer to the Checkout section for details on Requisition Creation.

You, the initiator, will be notified via email if the cart was returned. You can access your returned carts from:

- Shop Main Menu



- The Carts section of the Shopping Dashboard (Change the view to My Returned Requisitions)



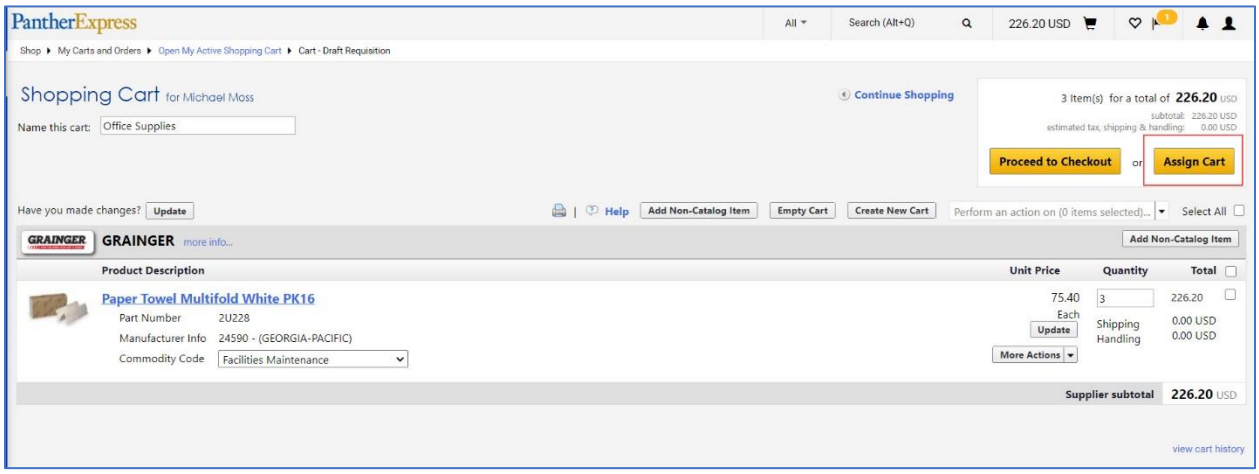
To correct the error, Activate the Cart as seen above, initiate the checkout process, and correct the account codes. For more details see the Checkout chapter.

Assigning a Cart

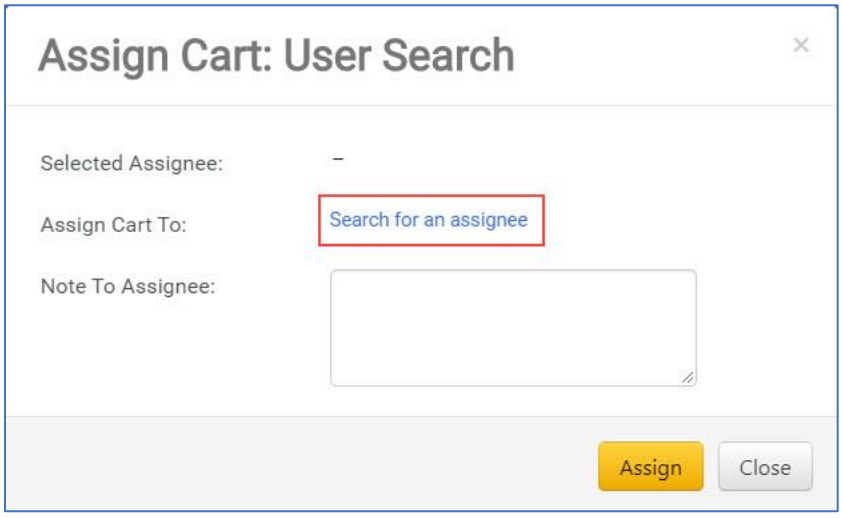
You can assign Carts to any buyer in the system, and these assigned carts will be shown on the Assigned Carts tab.

Ensure that the cart you want to Assign is the active cart (activate the cart as seen above, or open the cart form the Shopping Dashboard)

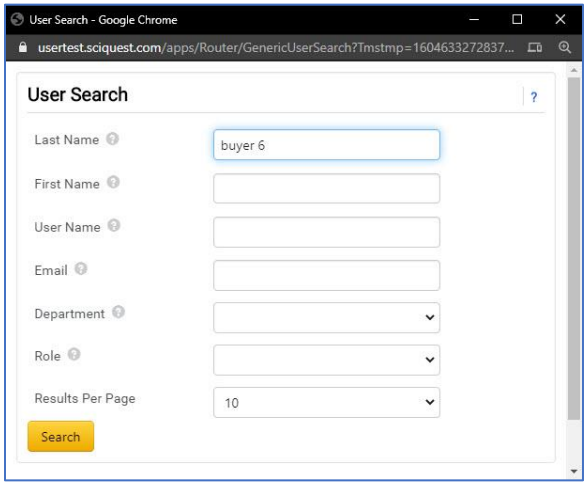
Select the Assign cart option.



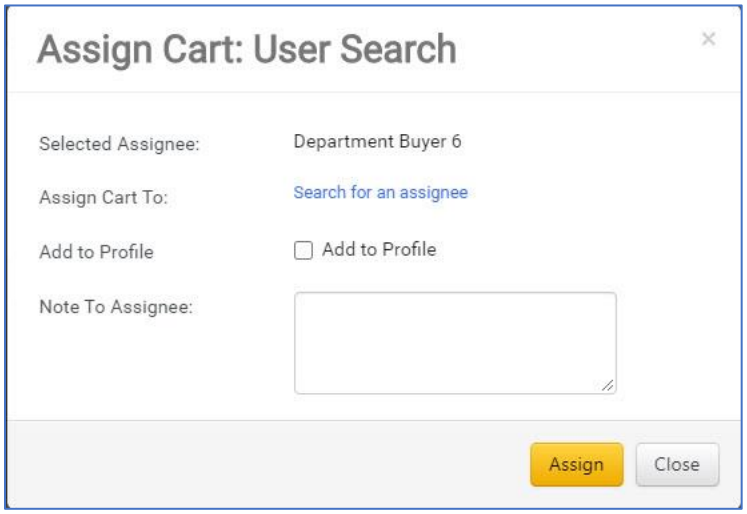
The Assign Cart: User Search window will open. Select Search for an assignee to select the user you would like to assign the cart to.



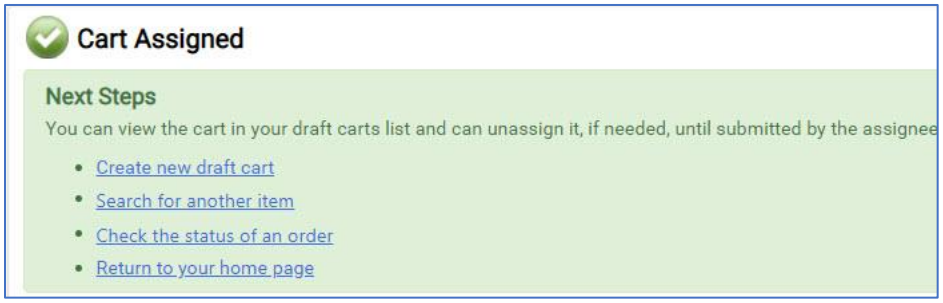
Use one or more of the search fields, then select Search.



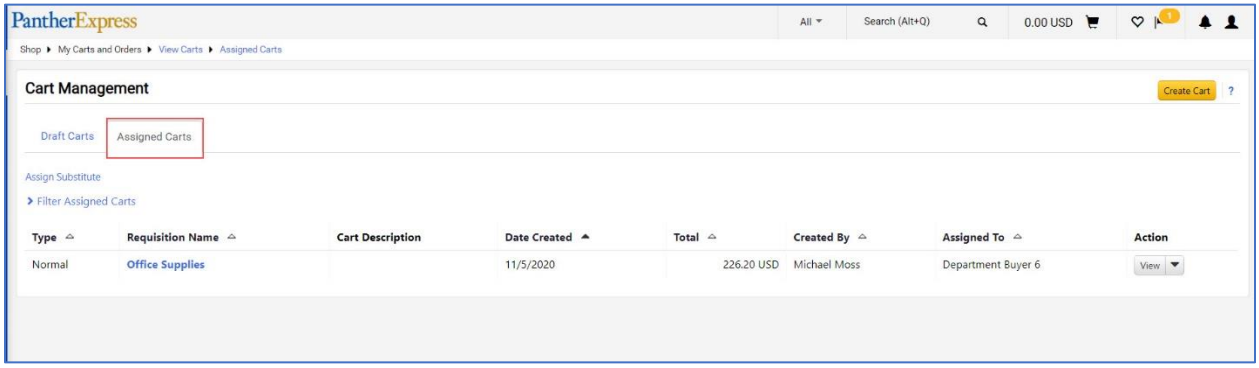
A new window will open with the results. Select the user, then click Assign on the User Search page.



A confirmation message will display confirming the cart assignment.



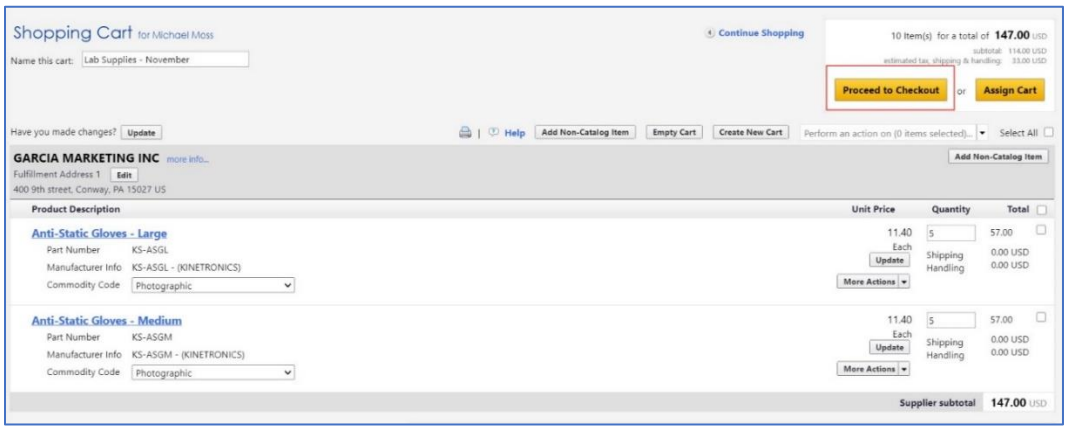
The cart will now be displayed on the Cart management page, on the Assigned Carts tab.



Checkout

Overview

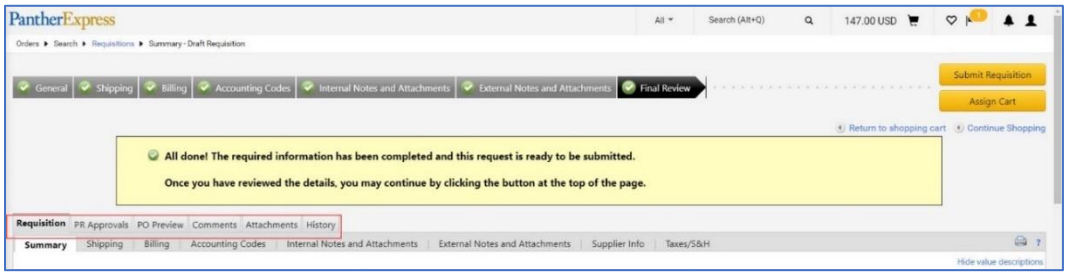
The checkout process can be initiated by selecting the Checkout option on the Active Cart page.



The Checkout page will become the Requisition, once Submitted. If all default values have been loaded successfully, a notification on the top of the page, will indicate this, and the Requisition Summary page loads.

The Checkout page contains the following elements:

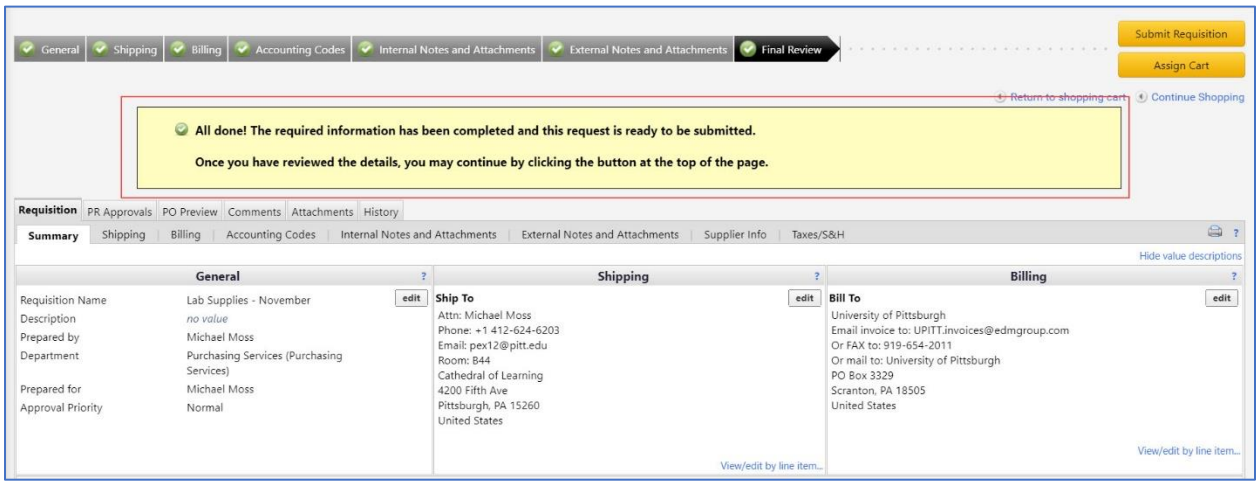
- Requisition – This page contains all details that will become the Requisition once submitted.
- PR Approvals – Show the applicable approval flow the Requisition will go through, once approved.
- Purchase Order Review – Shows a review of the Purchase Order, if submitted.
- Comments – Comments can be added to the Requisition if required by Purchasing services.
- Attachments – Attachments can be added to the Requisition if required by Purchasing services.
- History – Shows the history log the order went through.



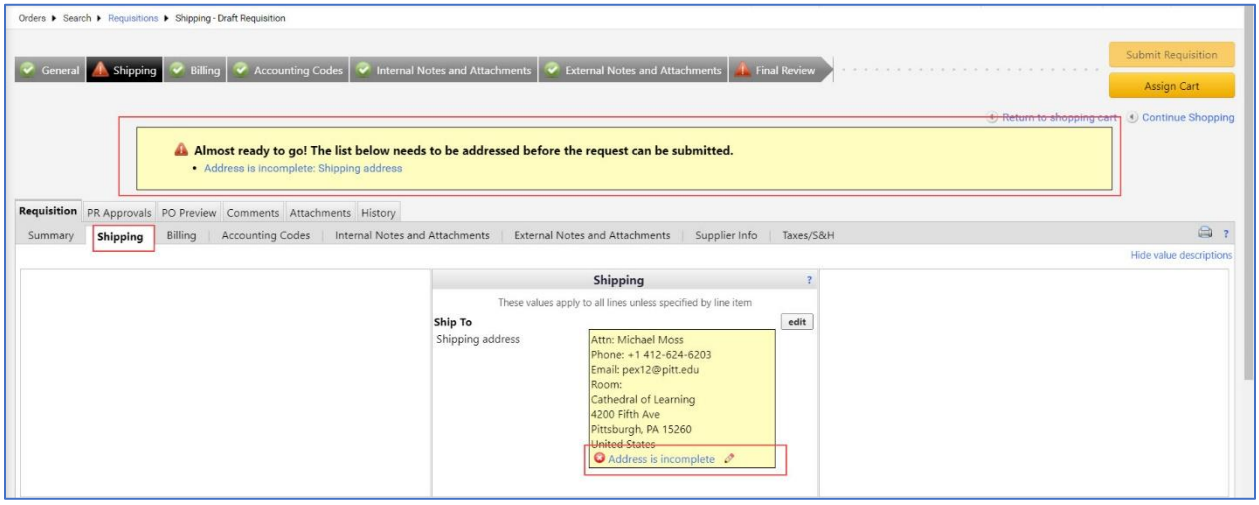
Requisition Tab

The Requisition Tab is the default that opens during the Checkout process. If all default values have been loaded successfully, a notification will confirm this on the top of the page.

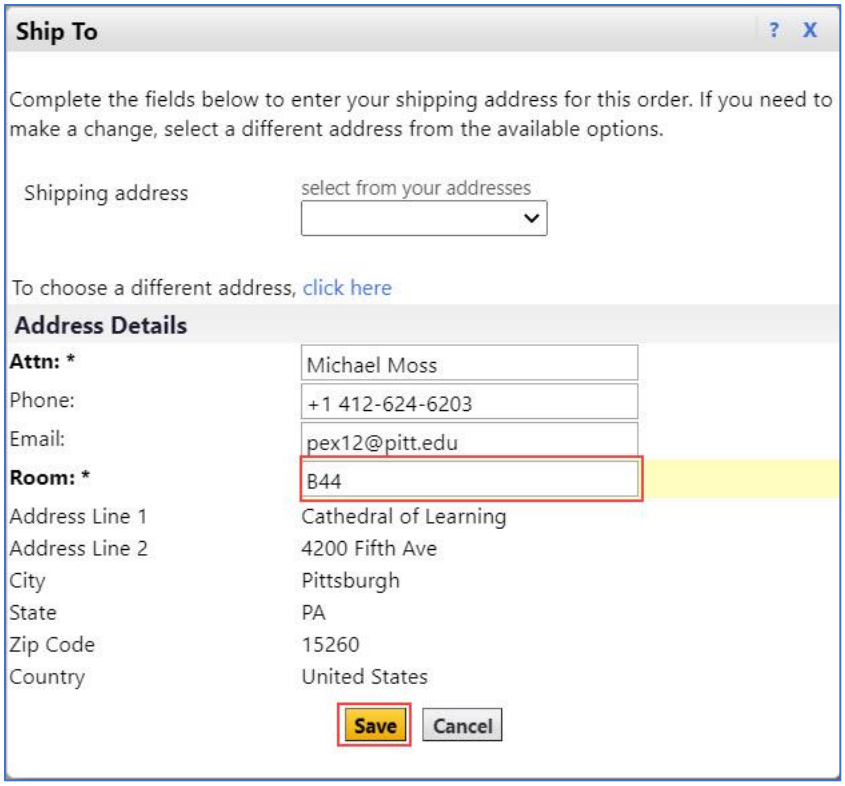
Note: The notification only confirms the application of the default values. These need to be reviewed, and in most cases updated.



In case some information is missing, for example the Room number, an error will be displayed, and the system will open the location of the error, in this example the Shipping tab.

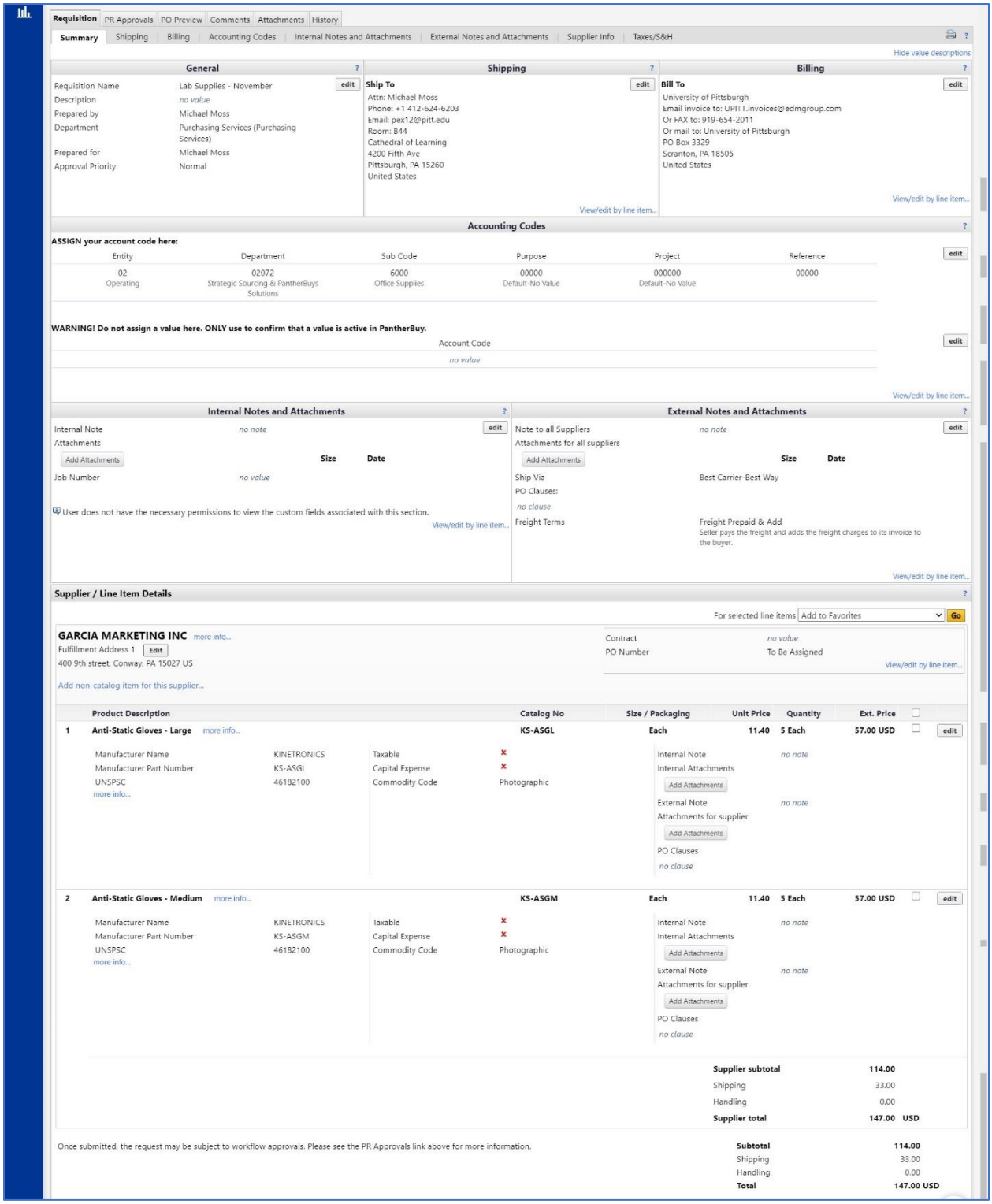


Correct the error, (in the example above, Address is Incomplete), then return to the Summary page.


Ship To
? X
Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.
Shipping address
select from your addresses
To choose a different address, click here
Address Details
Attn: *
Michael Moss
Phone:
+1 412-624-6203
Email:
pex12@pitt.edu
Room: *
B44
Address Line 1
Cathedral of Learning
Address Line 2
4200 Fifth Ave
City
Pittsburgh
State
PA
Zip Code
15260
Country
United States
Save
Cancel

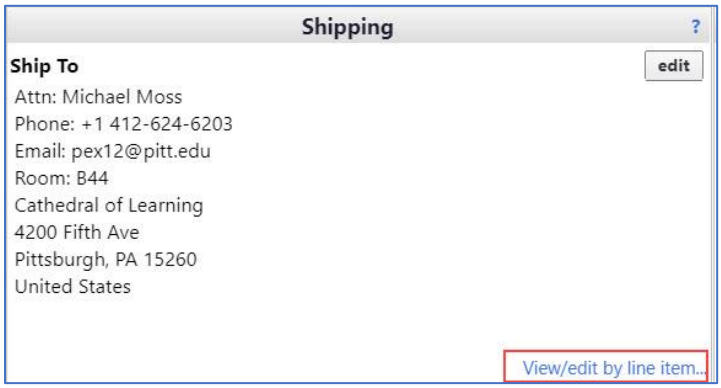
Summary

The Summary page will contain a summary of the tabs on the Requisition page.

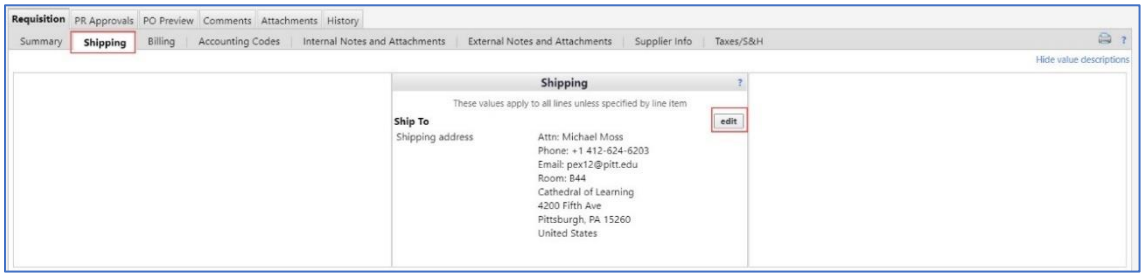


Shipping

The shipping address will show the default shipping address. This can be edited with the View/Edit by line item.



The Shipping address can also be edited on the Shipping Tab.



Note: Ensure that the Shipping address is correct, as most suppliers will not be able to modify this once the Purchase Order is created.

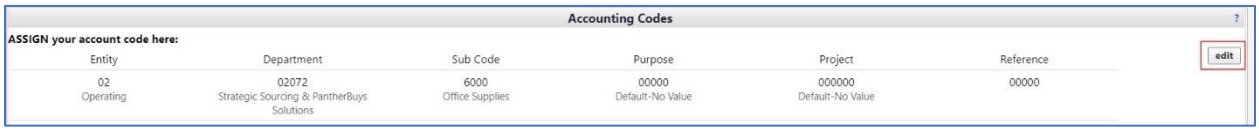
Ensure that the Billing address is correct, as most suppliers will not be able to modify this once the Purchase Order is created.

Accounting Codes

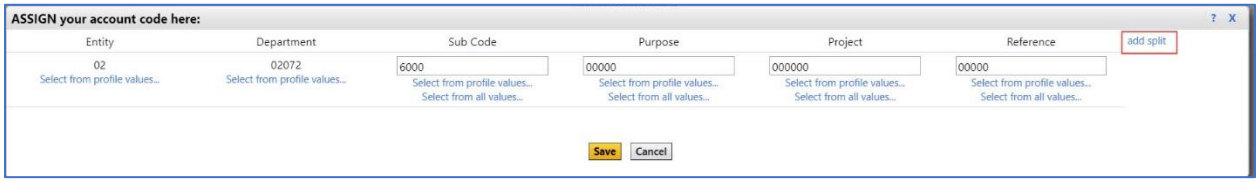
The Panther Express system provides the possibility to apply accounting codes for two roles:

Header Level Account Codes

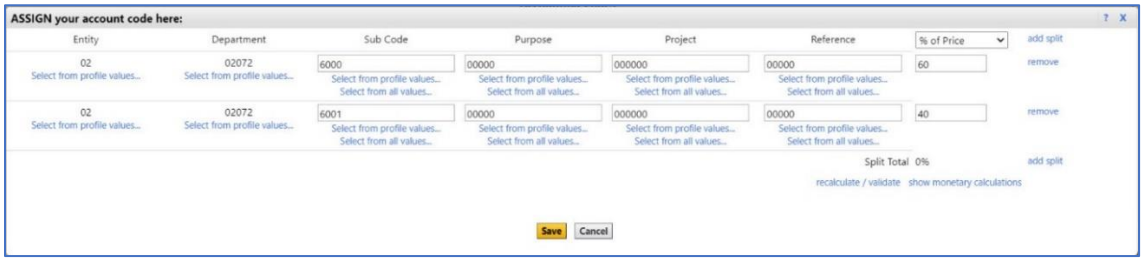
The account code will apply to the entire order. All Line Items will be charged to the same account. The default Header Account is displayed on the Summary Tab and can be edited.



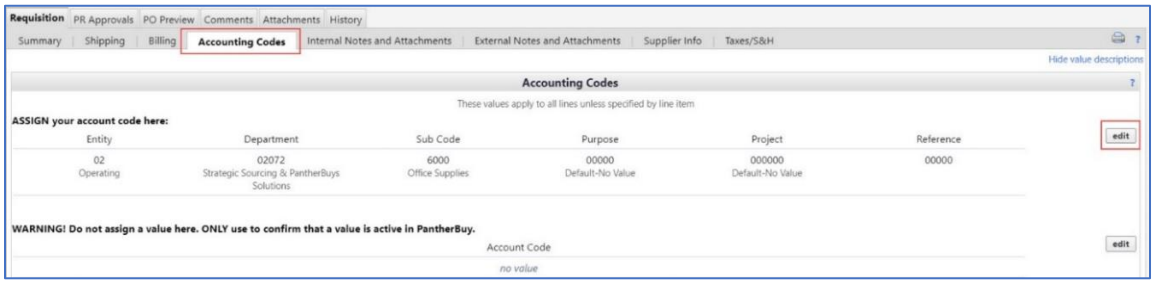
The available options in the Entity, and Department segments depend on your level of access. While editing the account, you can also add splits, by percentage or fixed value.



Note: you can only split cost between accounts you have access to.

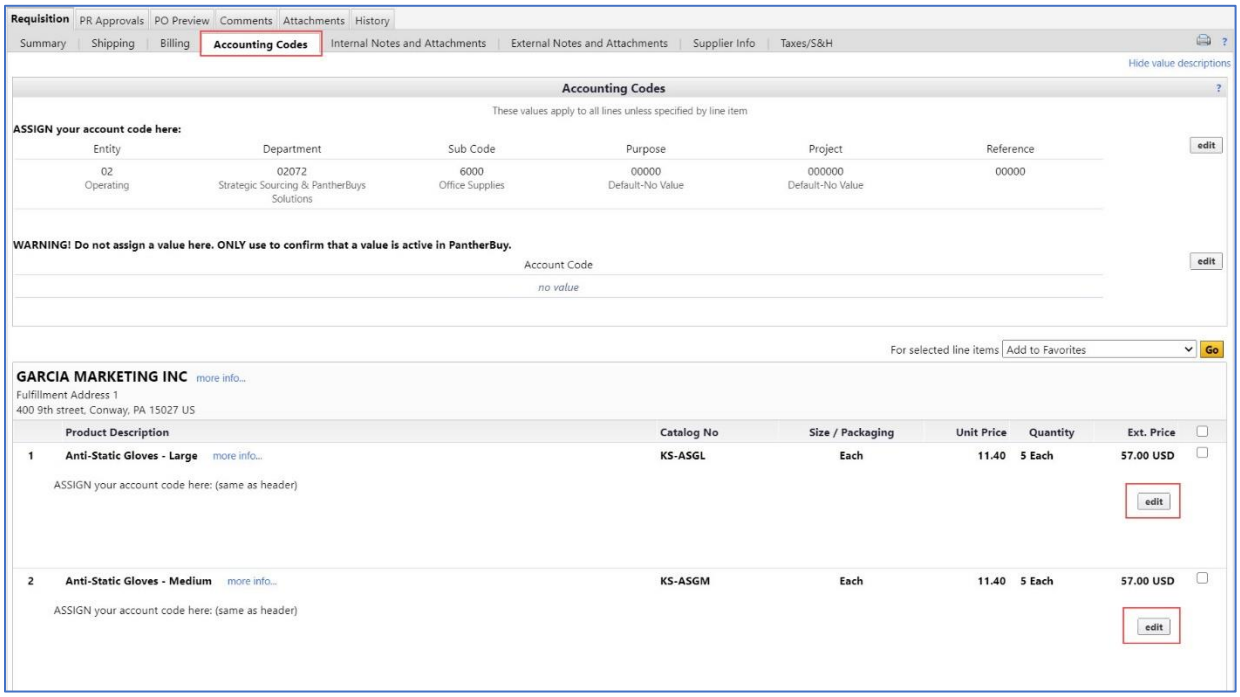


The Header Account can also be edited on the Account Codes tab.

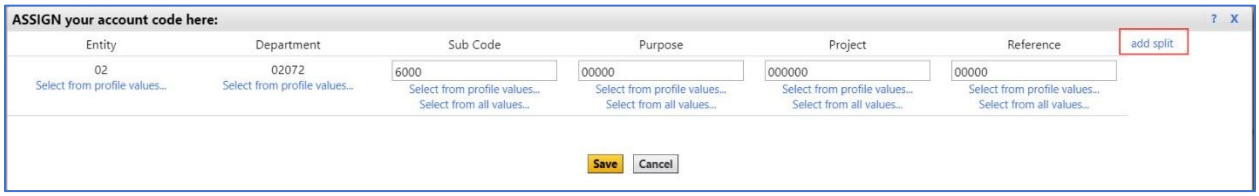


Line Level Account Codes

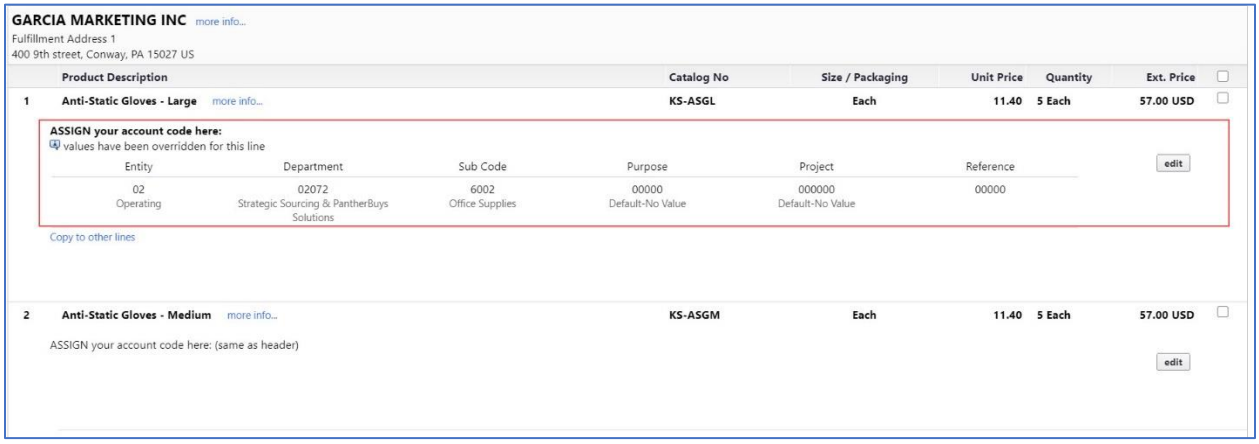
Account codes can also be assigned for each line item separately. You can do this on the Account codes tab. Scroll down to the Line Items, then select Edit.



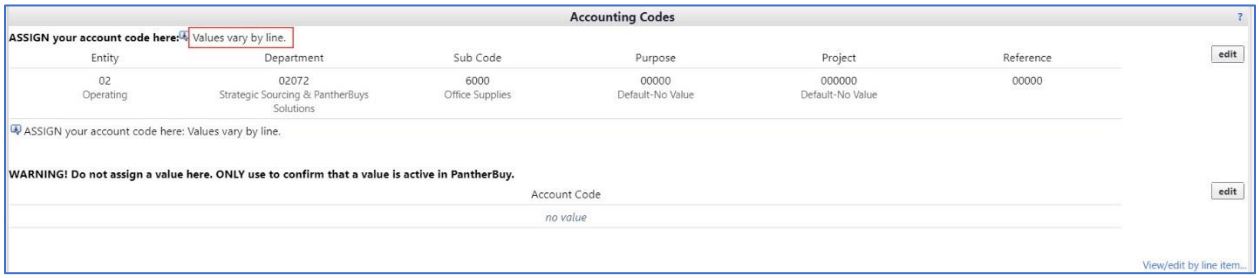
You can enter an account code to be charged to that specific account, and you are also able to add split accounts.



If a separate account was assigned to a line, it will show under the line.



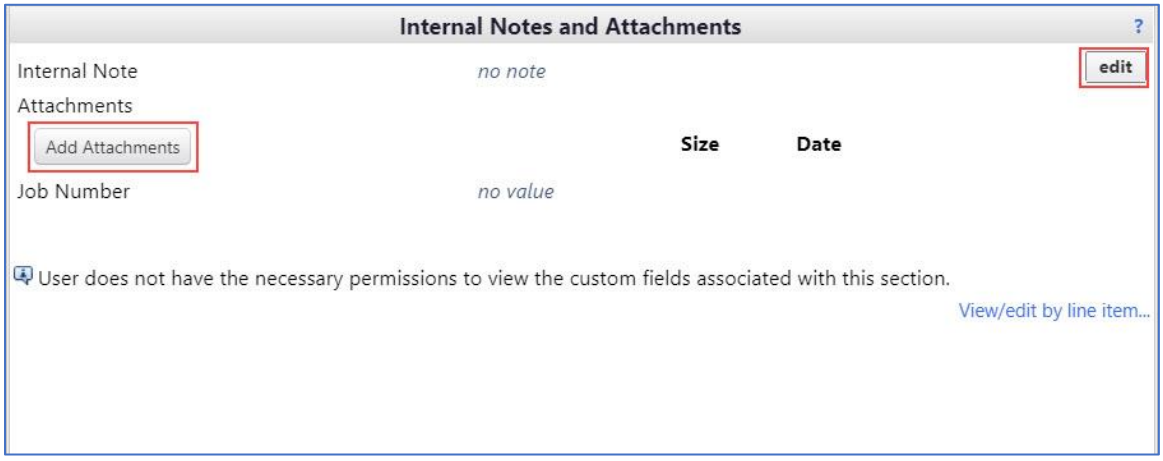
There will also be an indication on the header account section that account codes have been overridden for a line.



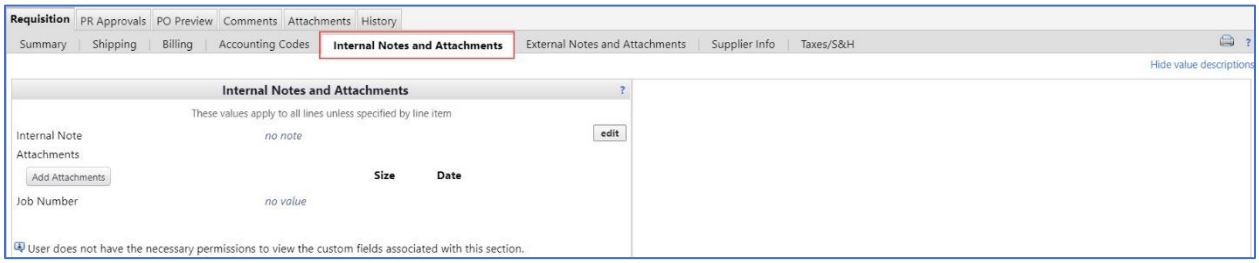
Internal Notes and Attachments

If there are any internal notes or attachments that needs to be added to the Requisition, you can add them here. Select Edit to add notes and select Add Attachments to upload attachments.

Note: These notes and attachments will only be visible internally.



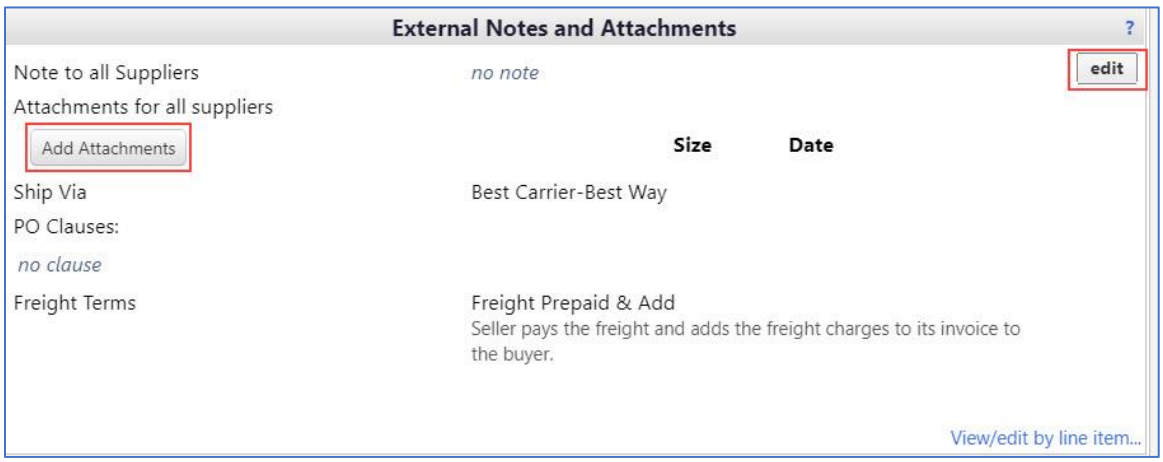
You can also access internal notes and attachments on the Internal Notes and Attachments tab.



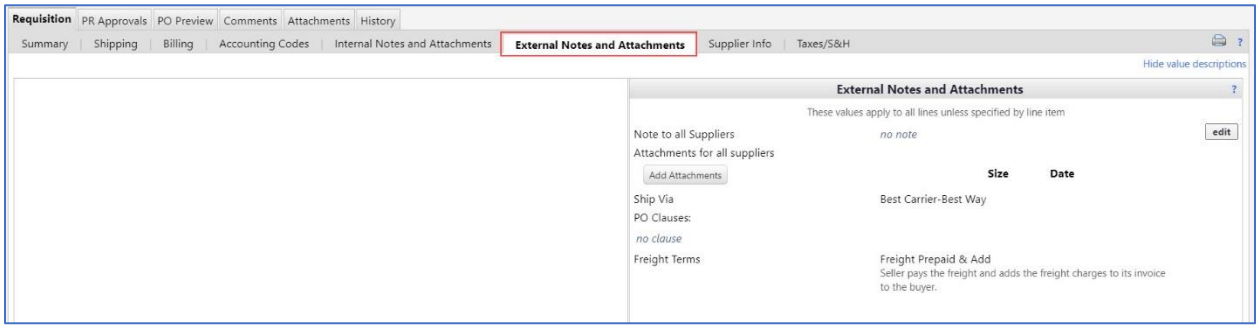
External Notes and Attachments

If there are any external notes or attachments that are required, you can add them here. Select Edit to add notes and select Add Attachments to upload attachments.

Note: Only use this function if the supplier is specifically requesting an attached file.

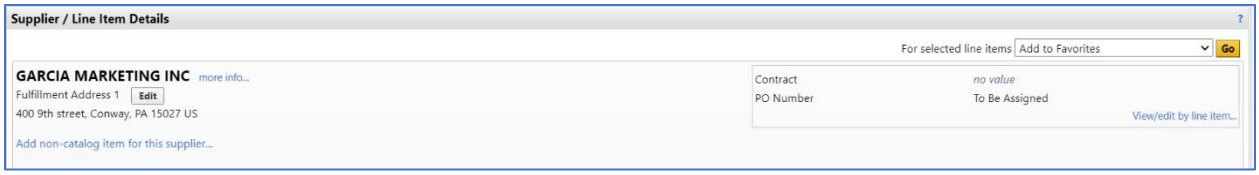


You can also access internal notes and attachments on the Eternal Notes and Attachments tab.

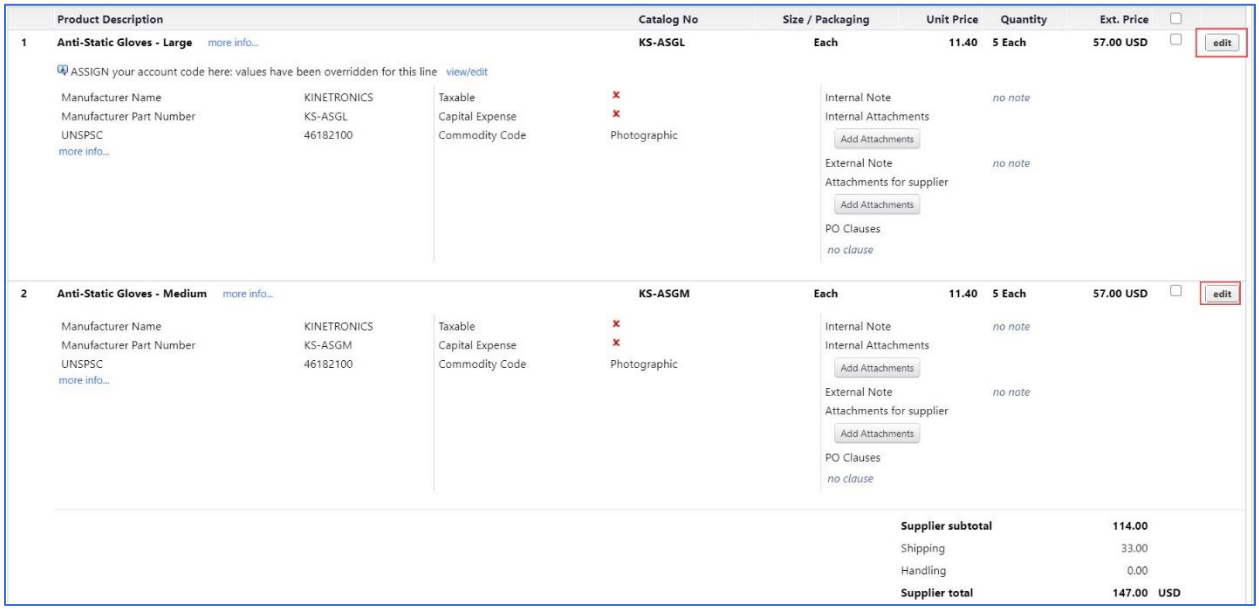


Supplier / Line Item Details

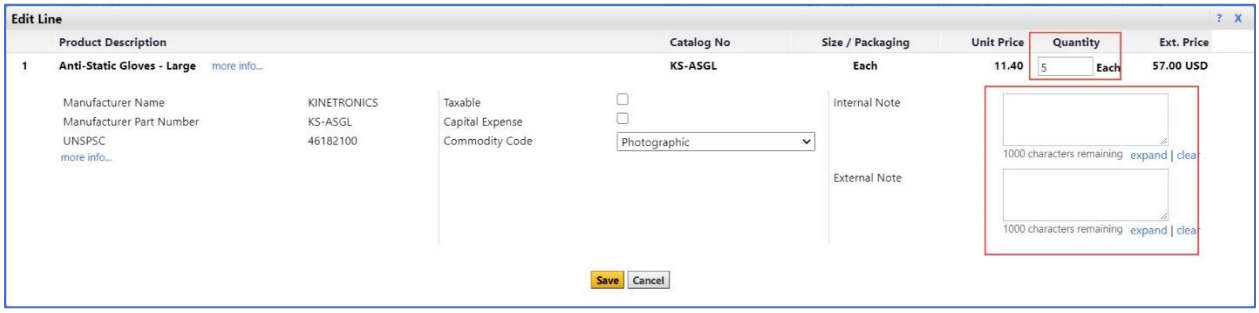
The Supplier / Line-Item detail section will show the Supplier Information and the Line Items.



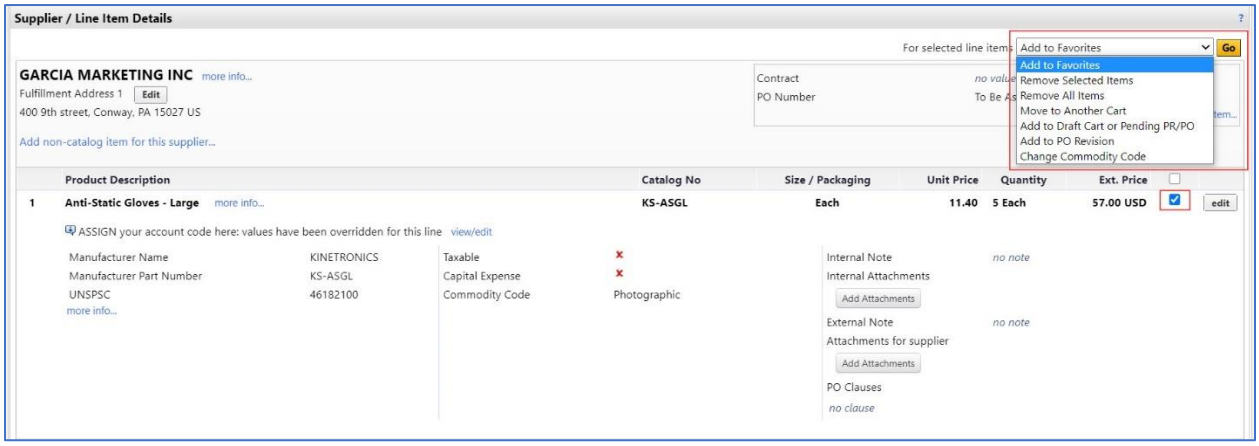
The Line Item Details section will show the current content of the cart. The line items can be updated using the Edit button on the respective line.



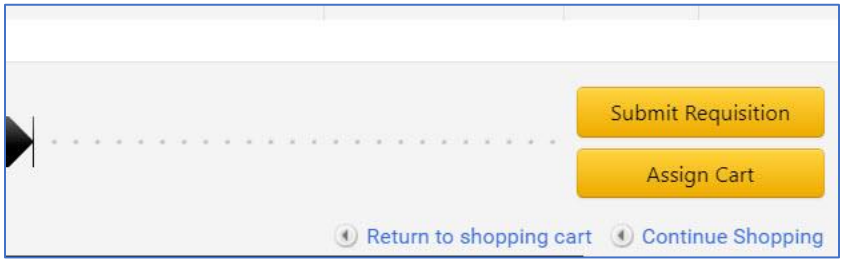
The only field available for editing is the Quantity. Internal and External notes can also be added to the Line itself.



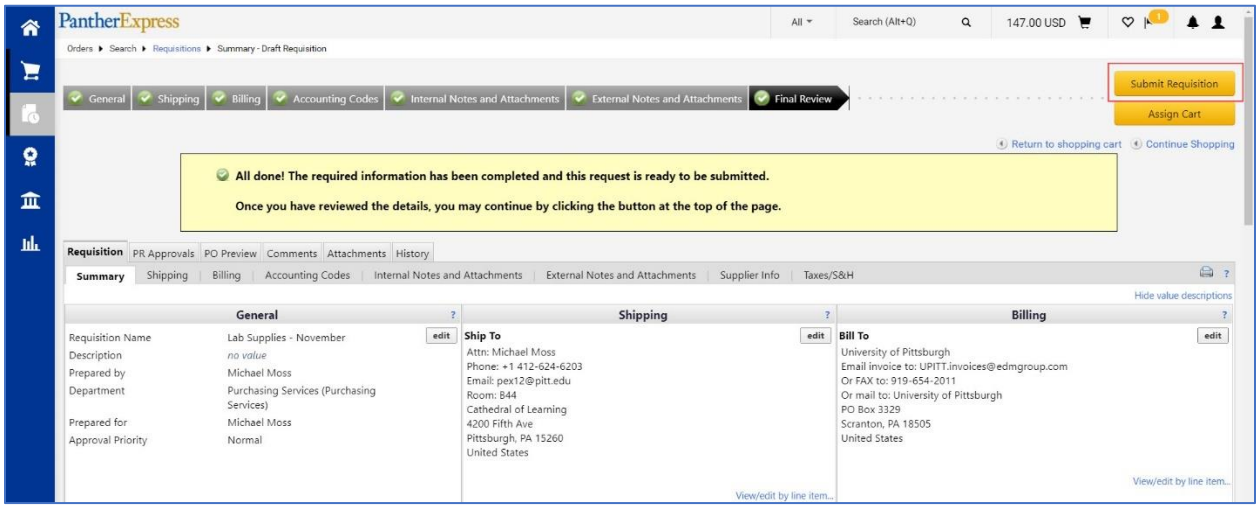
After selecting the checkbox on a line, the available Action Items can also be applied.



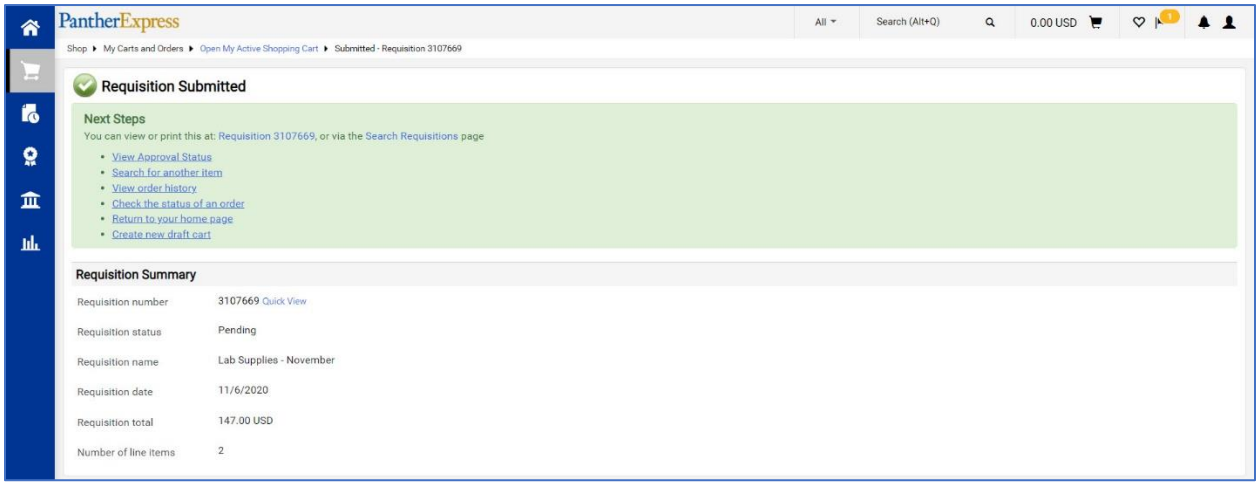
On the Summary page, you will still have the option to Assign the Cart to another user, to return to the Cart, or to Continue Shopping.



Once you verified all the above information and made all the required edits, select Submit Requisition.



A message will indicate that the Requisition has been submitted.



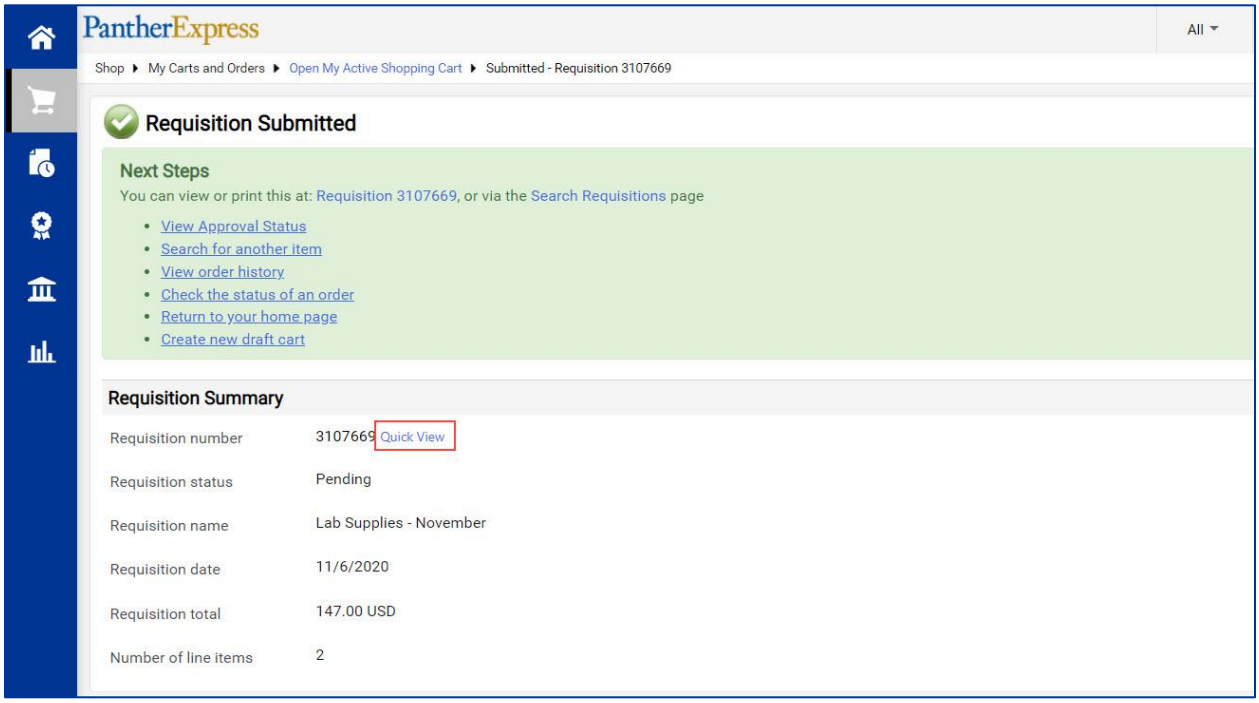
Requisition to Purchase Order

Verification

Once a Requisition is submitted, system approvals are applied to determine whether the Requisition is created or not, and whether the Requisition will trigger the creation of a Purchase Order. These Are

- Account Code verification
- Total Amount verification.

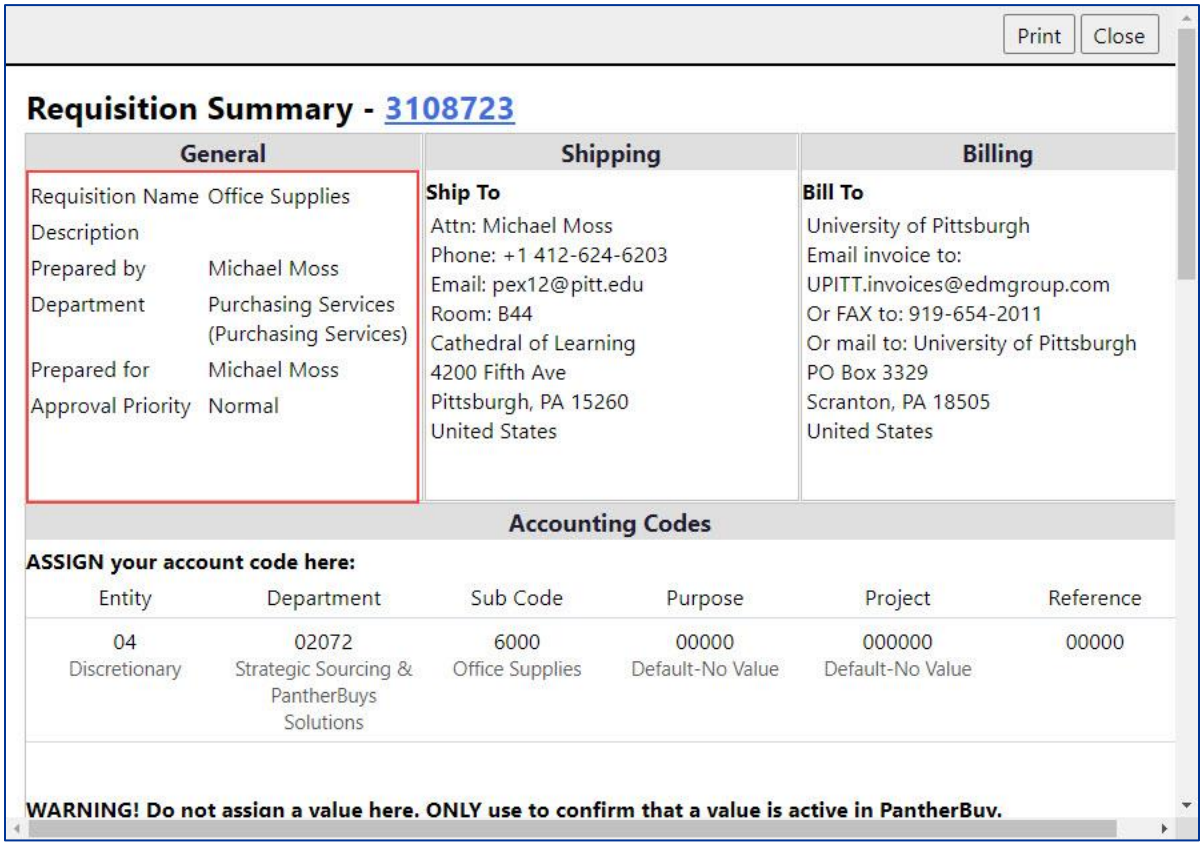
The Quick View option on the confirmation page will show the details of the Requisition submission outcome after the verifications were applied.



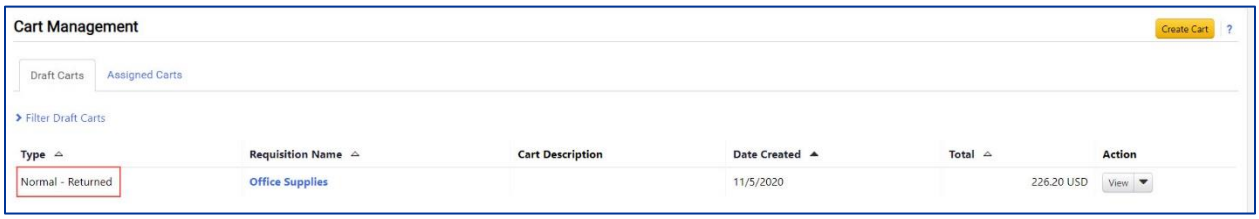
Account Code Verification

The account codes entered on the Requisition are verified against a database of active account codes. If the account code is inactive, the Requisition is not created. The requisition will be returned as a draft cart.

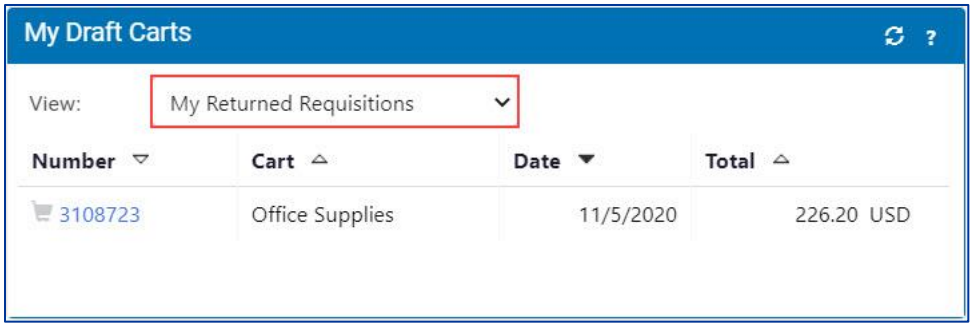
The General section on the draft cart Summary Quick View window will not show an error, as the Requisition has never been created.



You will be able to find these carts in the Draft Carts; they will be labeled as Returned.



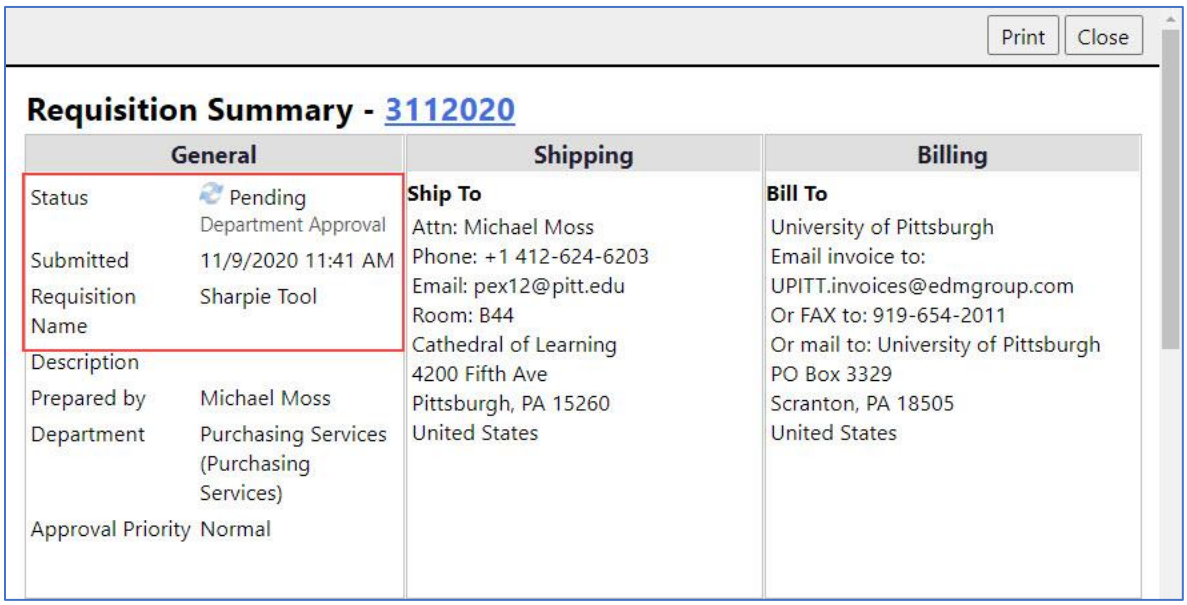
You can also see the Returned Requisitions on the Shopping Dashboard, on the My Draft Carts section. Change the view to My Returned Requisitions.



You can open the history tab of the returned Requisition to determine the error. To correct the error, activate the cart by selecting the name/number, correct the account codes, then resubmit the Requisition. (for details, refer to the Managing Carts section.)

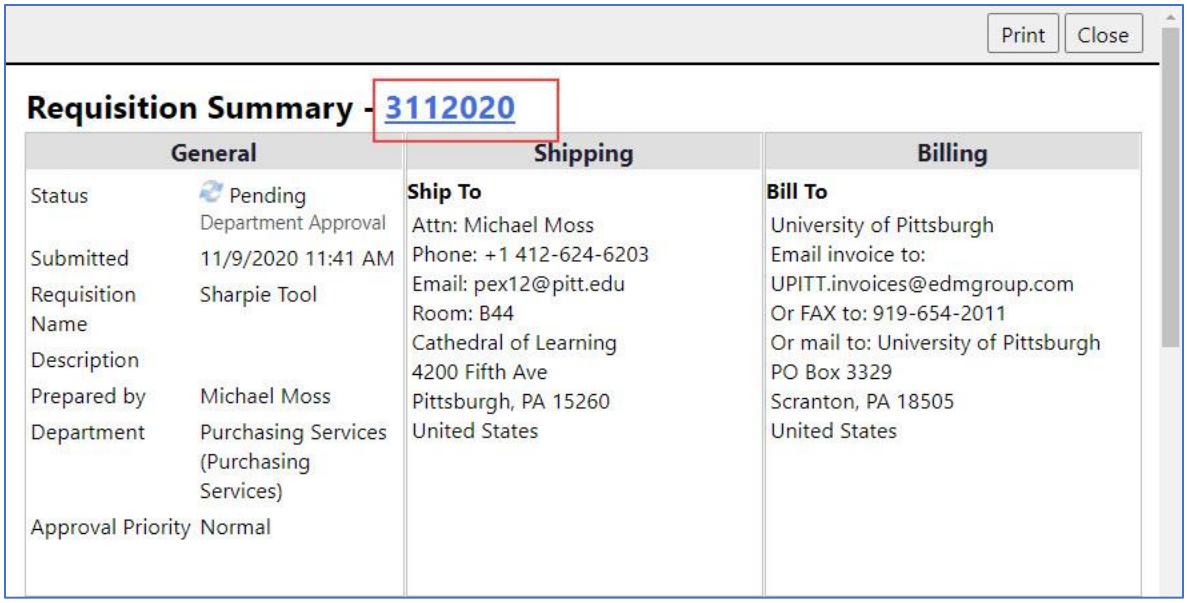
Total Amount Verification

If the total amount of the requisition is higher than the level limit assigned to you, the Requisition will be sent for approval. This will be clearly marked on the Quick View page.

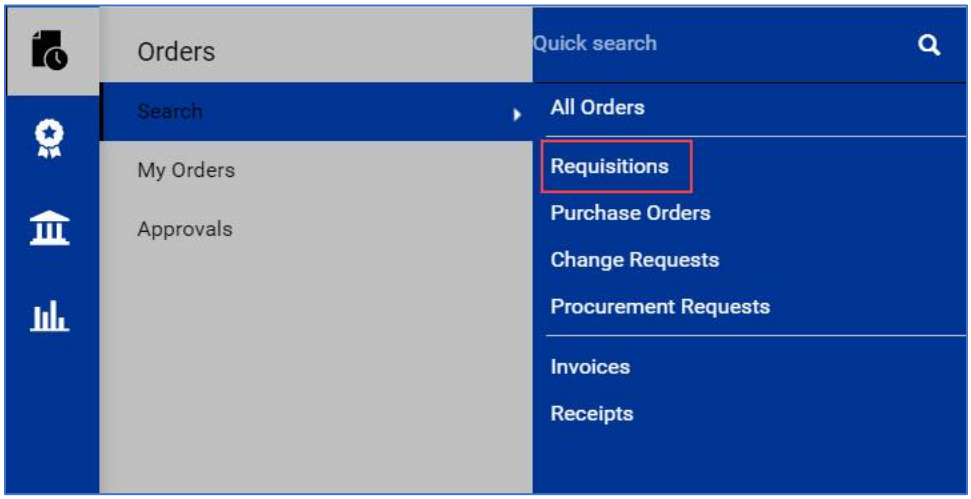


Review Approvers

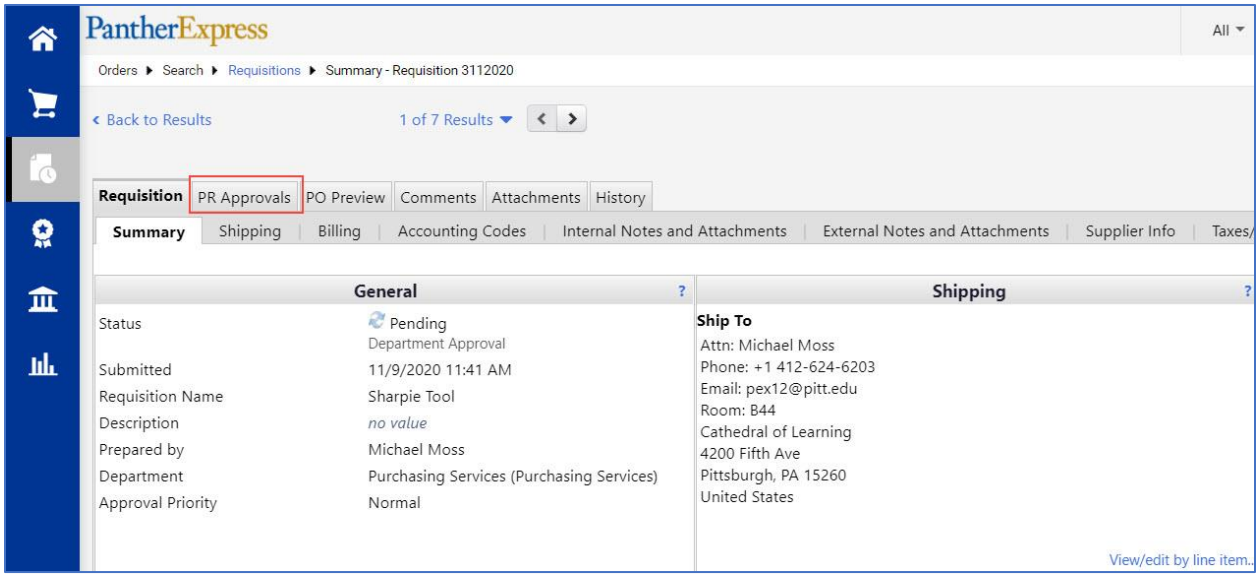
To review the assigned approvers to the pending Requisition, open the requisition either from the Quick View or the Shopping Dashboard.



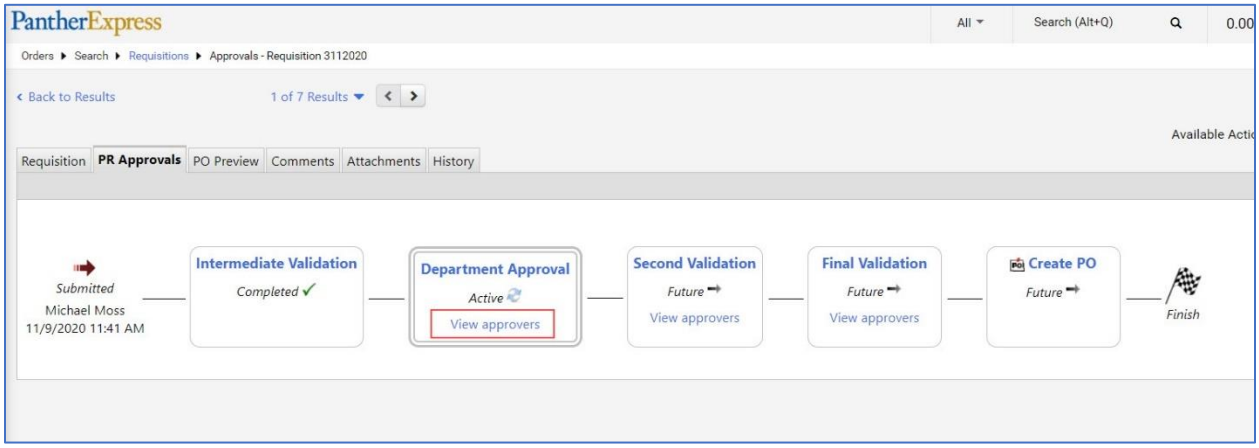
You can also access the Requisition from the Search Main Menu.



Select the PR Approvals Tab.



The PR Approvals will show the applicable workflow, which provides access to the assigned approver list.



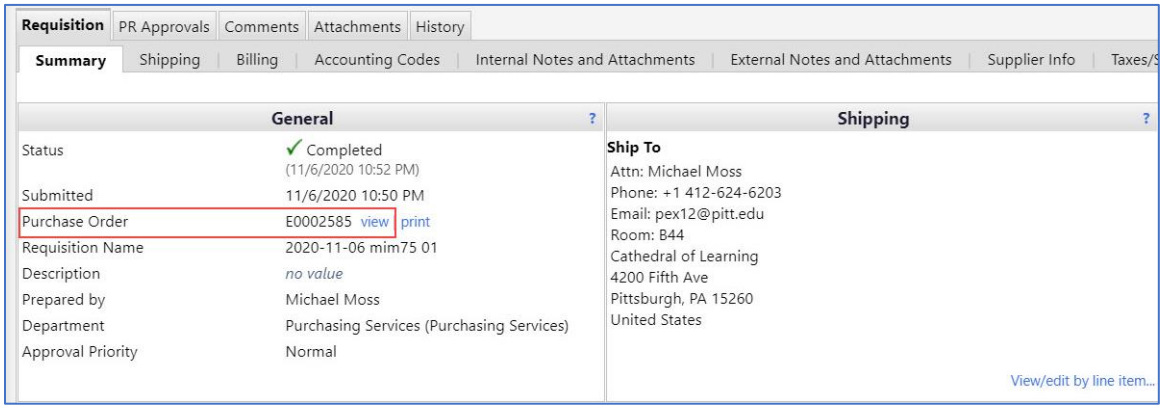
Purchase Order

If the Requisition passes both controls, the Purchase Order will be created automatically. You can access the Purchase Order from the Shopping Dashboard, or from the Search Main Menu

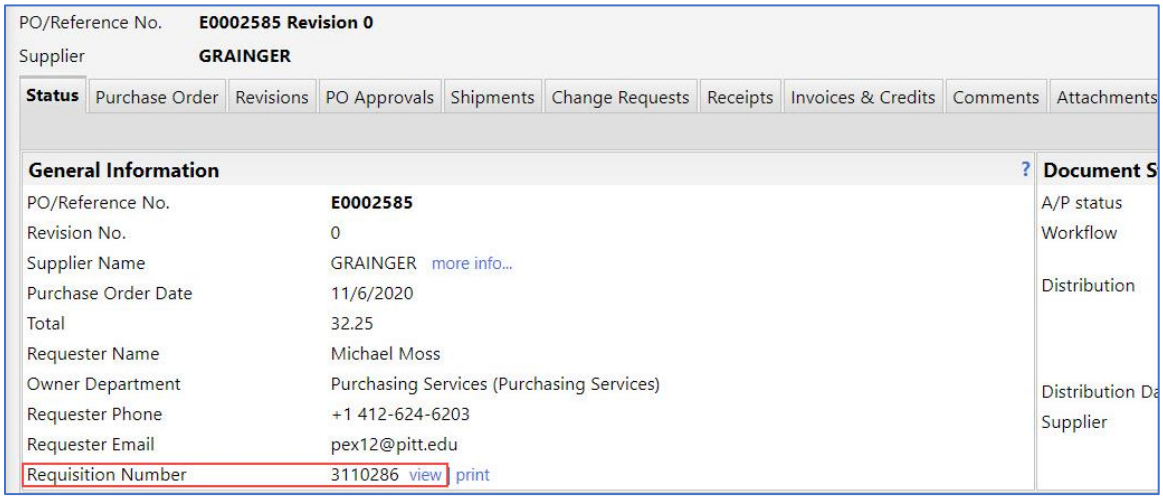
Related Documents

The initial Requisition and the newly created Purchase Order are related documents, they belong to the same purchase. The system provides you a shortcut to access the other related documents from each document, if any.

The Purchase Order can be accessed from the Requisition.



The Requisition can be accessed from the Purchase Order.



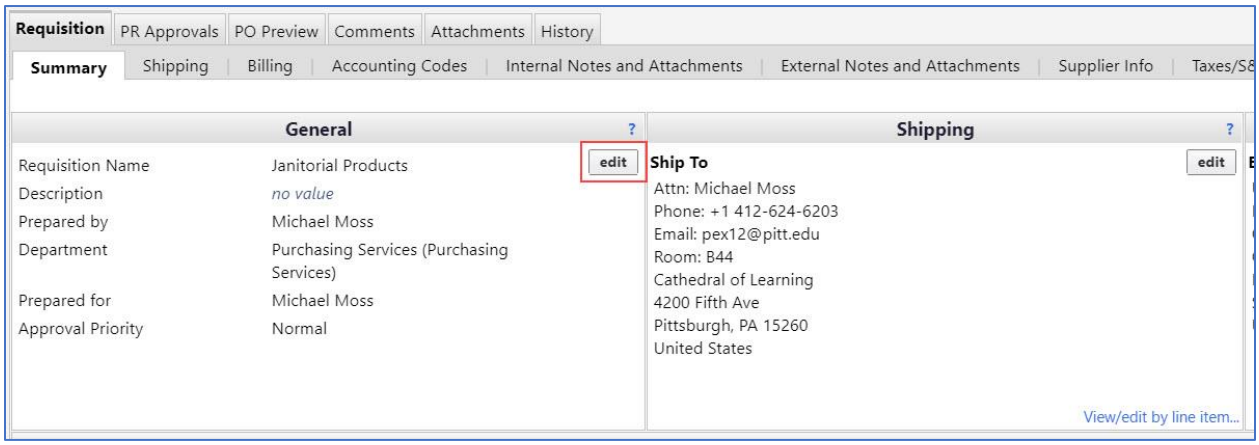
As the Requisition “evolved” into a Purchase Order, all updates, and reviews will be done in the relevant Purchase Order.

Placing Orders on Behalf of Other Users – Prepared for and Prepared By:

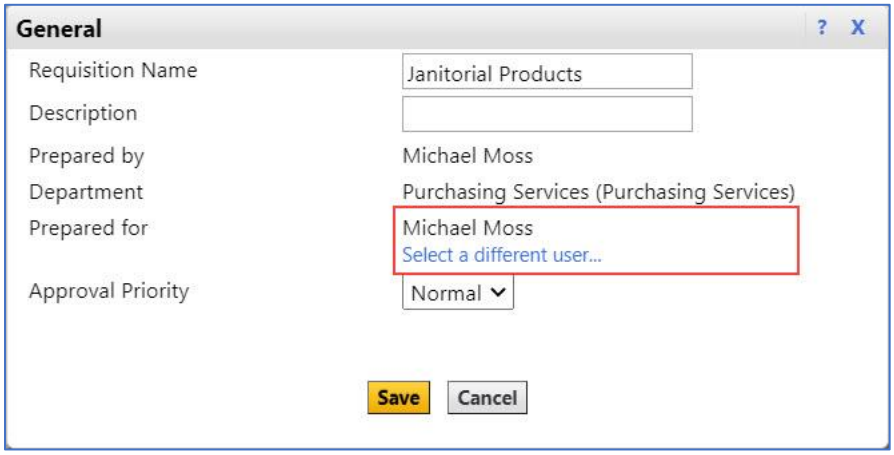
A user can place an order for another user in the application. This functionality is mostly used when a department administrator or a department buyer places an order for other individuals in their department, or they are working with another department to post a transaction in the system. By indicating the person (prepared for), they are ordering the item(s) for, the original requester (prepared by) can still see their order via Document Search, and reporting information is not compromised.

Often, a user is responsible for creating orders for other members of their team or department. In this scenario, the user who creates the cart for another user is considered the Prepared By user and the user with the original request is the Prepared For user. The Prepared By user can see the PR and the Purchase Order(s) generated for the Prepared For user. This allows the Prepared By user to maintain visibility into a Purchase Order after they have created it. Note: The approval for the transaction will be routed based on the Prepared For individual.

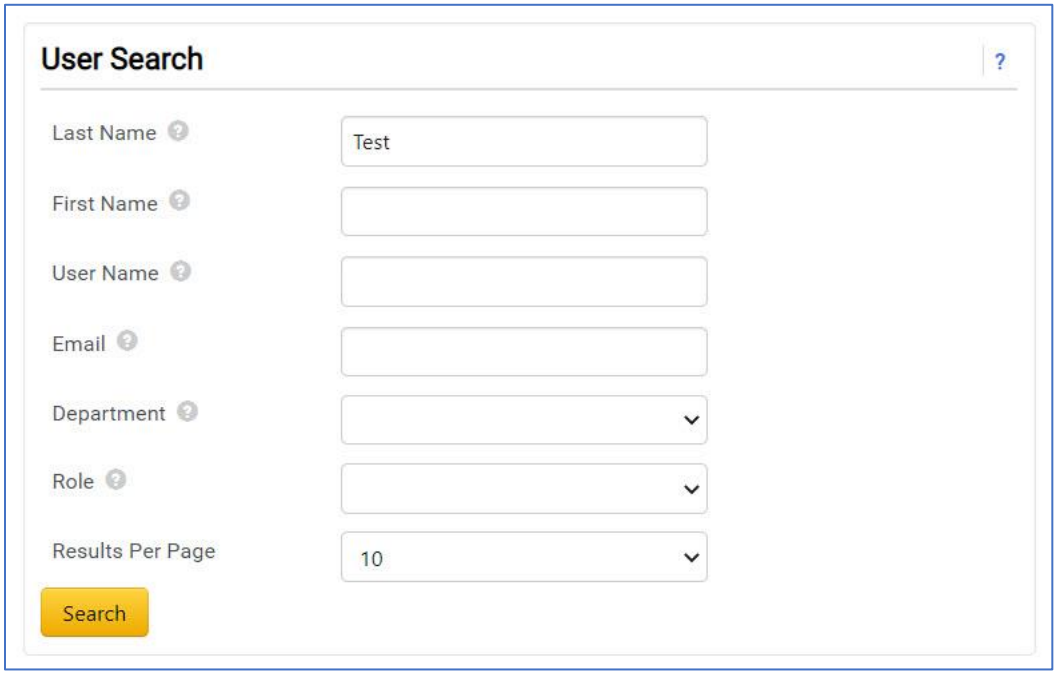
- Create a new shopping cart and add items, and Proceed to Checkout
- In the General Window, select Edit.



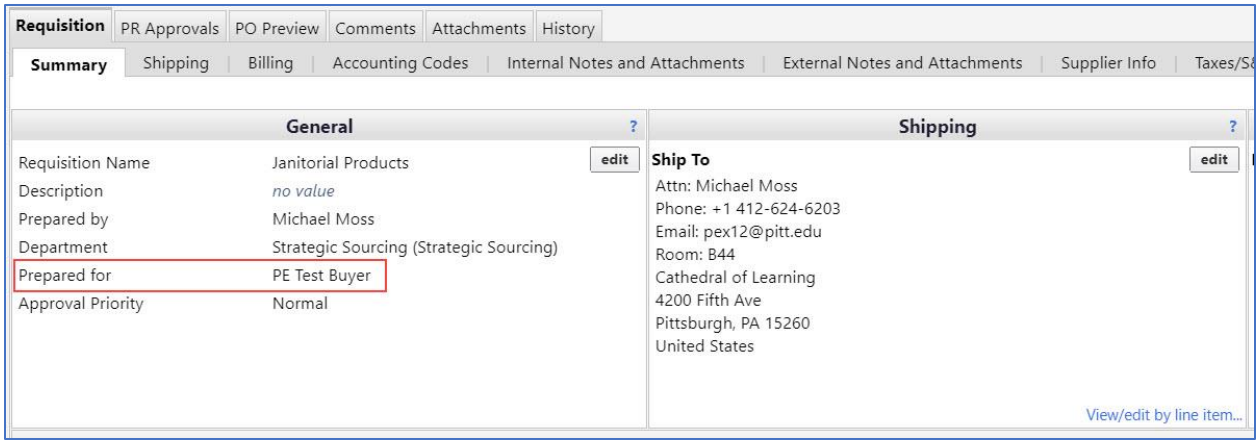
- In the Prepared for field, click Select a different user.



- Enter appropriate search criteria (First Name, Last Name, Email, Department and Position are available fields), and select the Search button.



- Select the desired user from the list of user(s), then select the Choose Selected User button. The pop-up window closes. On the shopping cart page, the Prepared For field now displays name of the selected user. Select Place Order to complete the order.



Note:

- The requisition is created in the name of the selected user and appears in My Requisition list of the selected user.
- The values in the Details section of the requisition, such as Ship To and Bill To addresses and Codes, are the values from the profile of the user who created the requisition.
- The header information of the requisition indicates the names of both the Prepared By user and the Prepared For user.

Commitments

Most Purchase Orders created in PantherExpress are being exported to Oracle in order to match and commit the funds against the account code used on the Purchase Order. The following information and instructions pertain to relieving these committed (encumbered) funds.

The following Purchase Order types are NOT being exported to Oracle.

- Dietrich School Stockroom orders (GL transactions)
- CSSD Software Store orders (GL transactions)
- Other Payment Requests

All other Purchase Orders are being exported to Oracle to have the changes committed against department accounts.

Fully invoiced POs and Line Items will have the full commitment relieved in Oracle.

- Any Purchase Order that has all line items fully invoiced will have the full commitment relieved in Oracle automatically. A fully invoiced Purchase Order will be automatically closed by the PantherExpress System.
- A Purchase Order line is considered fully invoiced when the quantity ordered on the line has been invoiced.
- Example: 2 boxes of paper for $50 on the Purchase Order; 2 boxes of paper for $35 on the invoice.

Invoices

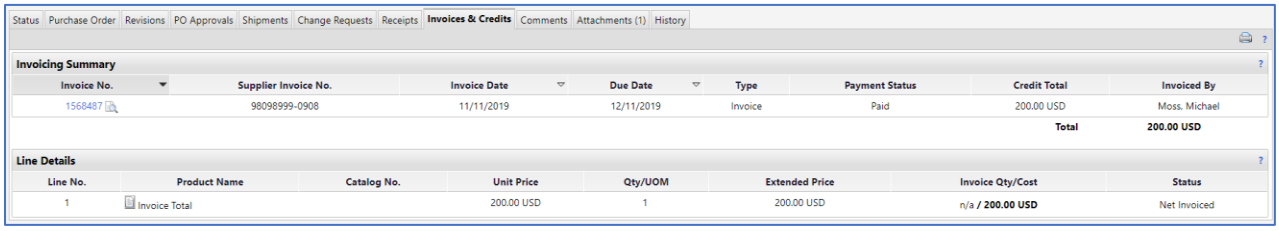
Searching for Invoices

You can find all invoices on the Invoice Dashboard. For more details review the Dashboards chapter.

Review Invoices

As the Purchase Orders are being processed, suppliers will issue invoices, which will be processed by Payment Processing.

There is no rule on when the invoices are received, this depends on the supplier. In any case, Invoices will be populated on the Invoices/Credits tab in the Purchase Order.



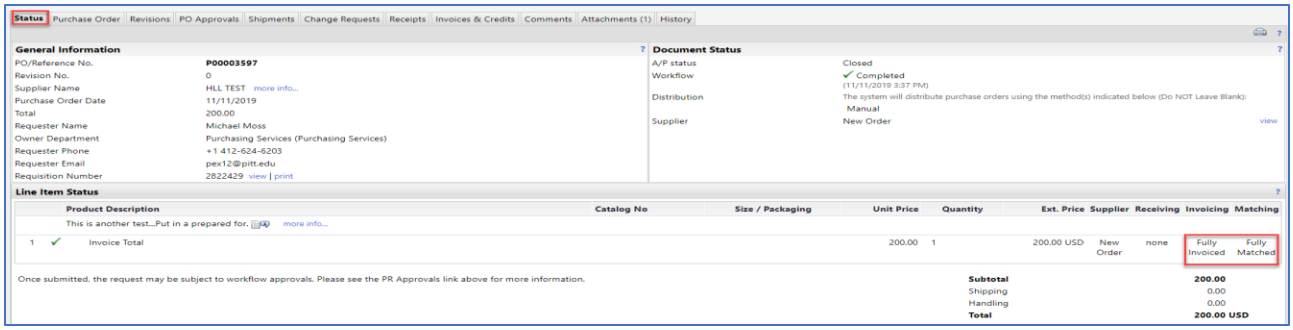
Invoice Matching

Invoice Matching is the process during which the PantherExpress system will match the received invoice with the Purchase Order the invoice was initiated for.

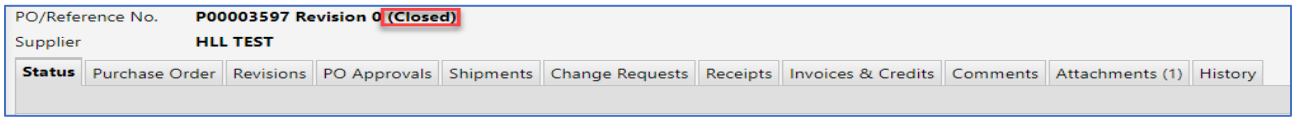
This process can result in two statuses, Partially invoiced or Fully invoiced.

- Fully Invoiced refers to the quantity invoiced matching the quantity purchased.
- Partially Invoiced refers to the quantity invoices is lower than the quantity purchased.

The Invoice statuses will be shown on each line on the Purchase Order Status tab.



Once all lines are fully invoiced and fully matched, the Purchase Order will go through the auto close process.



If the matching process identifies discrepancies, email notifications will be sent to the owner of the Purchase Order to correct these. These notifications are called NOIDs, or Notices Of Invoice Discrepancy.

NOID - Notice Of Invoice Discrepancy

Overview

Discrepancies are outcomes of the Invoice Matching process, which compares the following information on the Purchase Order to the information on the Invoice received. This includes the number of lines, quantity, and price per quantity.

Line Item Status

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1	✓ Sodium Chloride Sol'n 1L more info...	S5150-1L	EA	63.30	1 EA	63.30 USD	Sent To Supplier	none	Over Invoiced	No Matches
2	✓ Calcium chloride sol'n 100 mL more info...	21115-100ML	EA	66.00	1 EA	66.00 USD	Sent To Supplier	none	Over Invoiced	No Matches
3	✓ triton X-100 5 mL more info...	X100-5ML	EA	13.40	1 EA	13.40 USD	Sent To Supplier	none	Over Invoiced	No Matches
4	✓ shipping more info...	P2FREIGHT	EA	6.00	1 EA	6.00 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched

- If the number of lines or the quantity is less than on the invoice, the Purchase Order is partially invoiced, and there is discrepancy, as additional invoices may be added to the Purchase Order.

Line Item Status

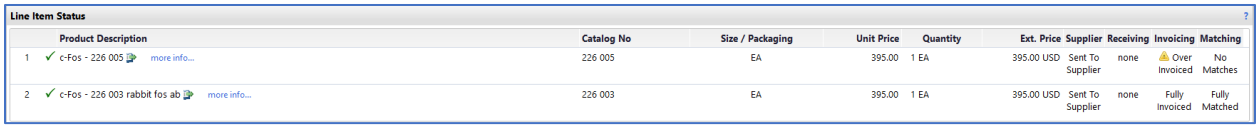
	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1	✓ Wrench Set Star, Torx WO160600 more info...	WO160600	EA	11.80	1 EA	11.80 USD	Sent To Supplier	none	none	No Matches
2	✓ BongoTies 10-Pack, Red BOA501R more info...	BOA501R	EA	5.24	2 EA	10.48 USD	Sent To Supplier	none	Partially Invoiced With Substituted Invoice Items	No Matches
3	✓ Set of Two 1 4 Camera Mounting Screws MAR116.138 more info...	MAR116.138	EA	9.74	1 EA	9.74 USD	Sent To Supplier	none	none	No Matches
4	✓ 509PLONG Quick Release Plate for 509HD Head MA509PLONG more info...	MA509PLONG	EA	36.45	1 EA	36.45 USD	Sent To Supplier	none	none	No Matches
5	✓ 82mm XS-Pro UV Haze MRC-Nano 010M Filter BWUVXSP82 more info...	BWUVXSP82	EA	77.79	1 EA	77.79 USD	Sent To Supplier	none	none	No Matches

- If the price per quantity is lower, but the number of lines and the quantity is equal to the amount on the Purchase Order, the Purchase Order is fully invoiced, and there is no discrepancy. This case can occur on non-catalog order, where the initial price is only an estimate.

Line Item Status

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1	✓ Cavit more info...	4765-551	EA	13.82	1 EA	13.82 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
2	✓ Hurricane Spray more info...	1002-344	EA	29.72	1 EA	29.72 USD	Sent To Supplier	none	Over Invoiced	Fully Matched
3	✓ Bibeeze more info...	5325-177	EA	5.99	2 EA	11.98 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
4	✓ Floss Threaders more info...	1937-808	EA	26.06	1 EA	26.06 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
5	✓ Proxabrushes (612) more info...	4540-392	EA	14.35	1 EA	14.35 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched

- If the number of lines and/or the quantity and/or the price per quantity is higher than on the invoice, a notice of discrepancy is triggered.



Line Item Status

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1	✓ c-Fos - 226 005 more info...	226 005	EA	395.00	1 EA	395.00 USD	Sent To Supplier	none	Over Invoiced	No Matches
2	✓ c-Fos - 226 003 rabbit fos ab more info...	226 003	EA	395.00	1 EA	395.00 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched

NIOD Resolution

To correct discrepancies, first you need to identify the discrepancy itself. Compare the Purchase Order and the Invoice to find the details. You can also refer to the notification email for details.

Once the discrepancy has been identified, resolve it by performing the following.

- Update the invoice, to match the Purchase Order, by returning items and requesting credits. The Credit invoice will balance out the original invoice, and the discrepancy will be cleared.
- Update the Purchase Order to match the Invoice, by creating a Change Request to update the quantities and/or the price or adding extra non-catalog lines. Change Requests are covered in the next chapter.
- Note: prices can only be adjusted on non-catalog orders.

Updating Purchase Orders

Change Request Overview

A Change Request should be completed for quantity and price changes, for adding a line item to a noncatalog order, using the add non-catalog item function, or for canceling a Purchase Order line. All other changes must be completed by using the Update My PO form.

In order to use the create change request functionality, you must go to the Purchase Order that requires the change and select Create change request from the Available Actions menu.

Please note, if there is a change request pending or in a draft state, Create Change Request will not be available in the drop-down menu. The draft or pending change must be deleted, rejected, or completed before the selection is available.

Change Requests before Invoicing

You can make the following updates to a Purchase Order before receiving an invoice.

- Update the Quantity
  - Note: The Change Request update will not notify the Supplier. The changed PO is not automatically resent to the supplier. Once the Change Request is completed, if the supplier has requested a copy of the updated PO, the buyer should contact the supplier to notify them of the change, generate a printout of the updated Purchase Order, and then send this to the supplier.
- Update Price
  - Note: Only available for non-catalog orders.

To update the Quantity or the Price on a Purchase Order before invoicing follow the steps below:

1. Verify Invoices – make sure there is no invoice.
2. Contact the Supplier,
3. ensure they can make the change,
4. ask if they need an updated Purchase Order
5. Verify open Change Requests
6. Create a Change Request and make the change.
7. Send the Updated Purchase Order to the supplier (Print Fax Version)

Change Requests after Invoicing

Once an invoice is received and a discrepancy is discovered use Change request to eliminate the discrepancy. You can make the following updates to a Purchase Order after an invoice was received to correct discrepancies.

- Update the Quantity

You *cannot* add items to your Purchase Order once it has been invoiced. The only exception to this rule occurs only when a quantity update is needed to correct a discrepancy.

For Example, the supplier sent you more items that you ordered but you decided to keep them. Use Create Change Request to correct this (see below).

If you want to reduce the quantity orders after invoicing, you need to contact the supplier and you *might* be able to use Create Change Request.

If the items have not yet shipped, the supplier may be able to remove it/them from the shipment. If the supplier tells you, they can remove the items, then you may use the Create Change Request feature. You will receive a credit invoice. If the items have already shipped, you will have to wait to receive the items and return them.

- Update the Price

You cannot modify the price after your order has been invoiced. The only exception to this rule occurs when the price update is needed to correct a discrepancy on a non-catalog order.

For Example, you placed an order for a custom order item and the exact price could not be determined at the time of the order. The supplier sent you an invoice for a higher price, discussed after the order, for the items than the price marked on the Purchase Order. Use Create Change Request to correct this (see below).

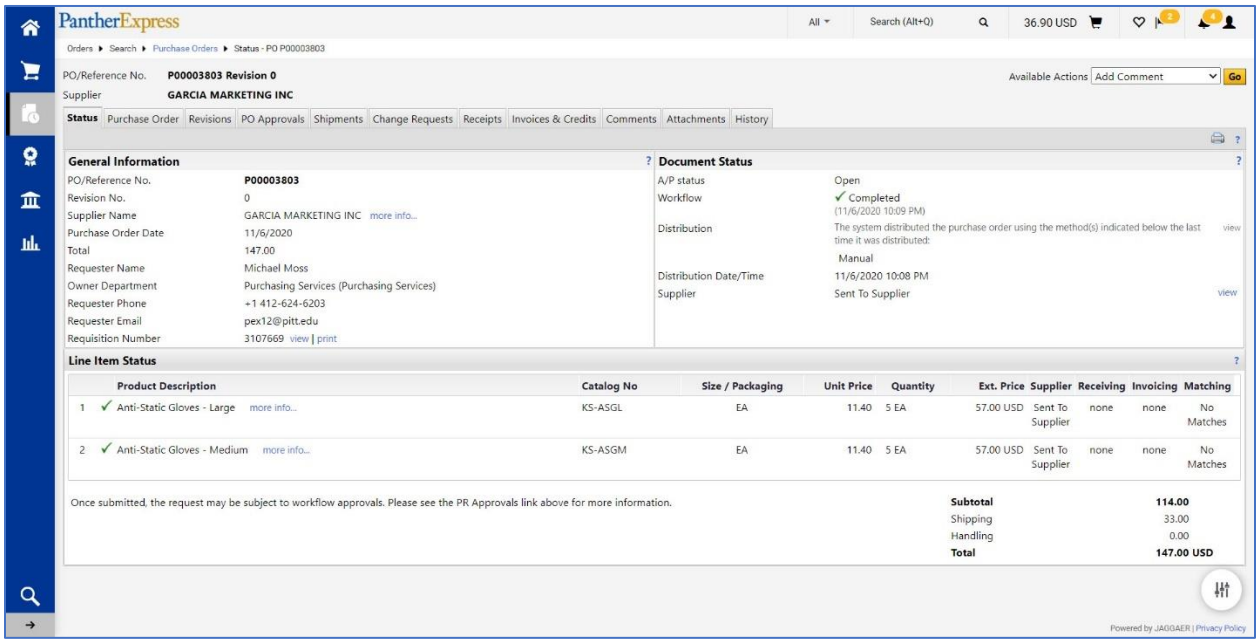
To update the Quantity or the Price on a Purchase Order before invoicing follow the steps below:

1. Verify the Invoice, identify the discrepancy
2. Verify open Change Requests
3. Create a Change Request

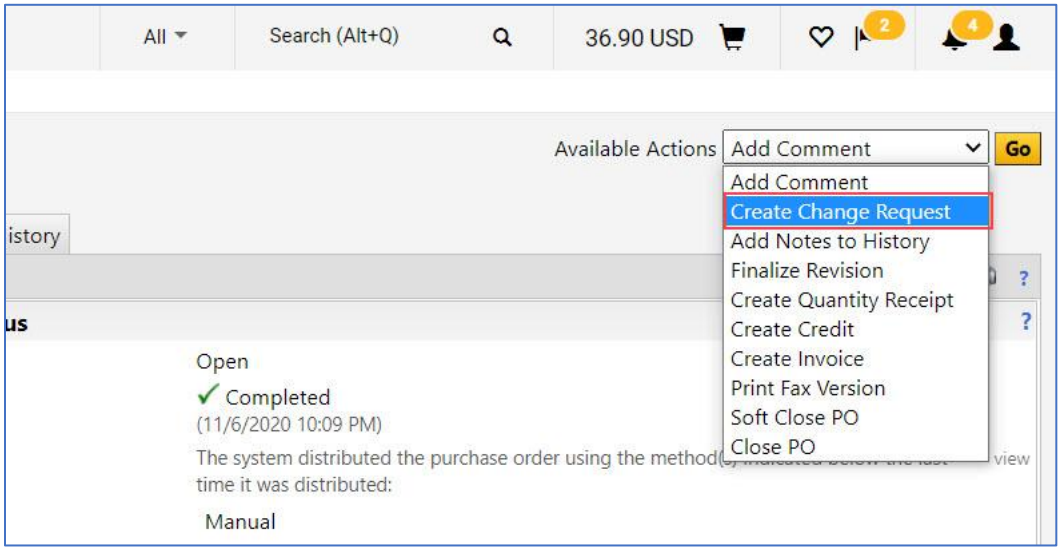
Creating a Change Request

Open the Purchase Order that needs to be updated.

Note: One Change Request can only contain one change. If there are two items you need to update or two updates on one item, you need to create two separate Change Requests

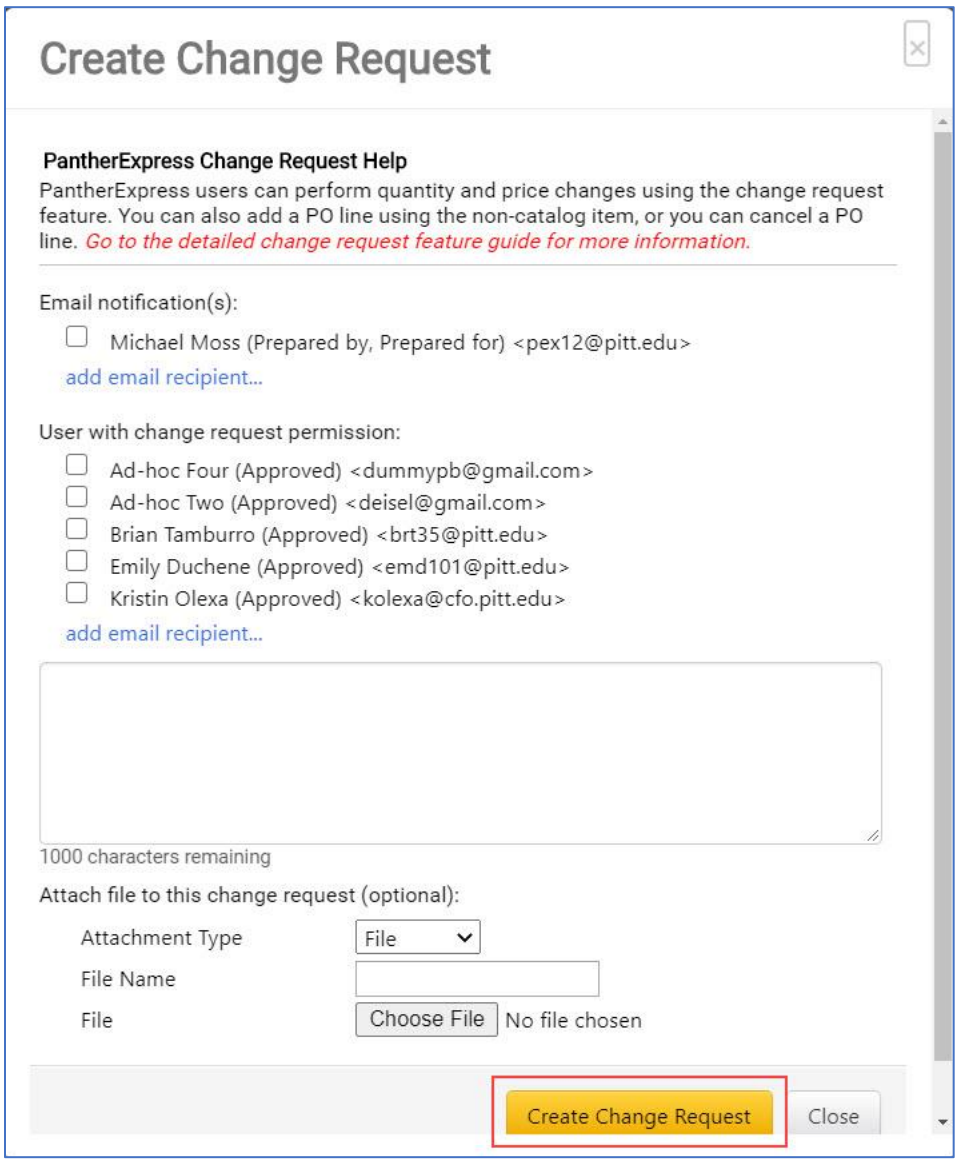


In the top right corner, click on the drop-down arrow for the Available Actions menu, and select Create Change Request, then use the Go button to start the Change Request.

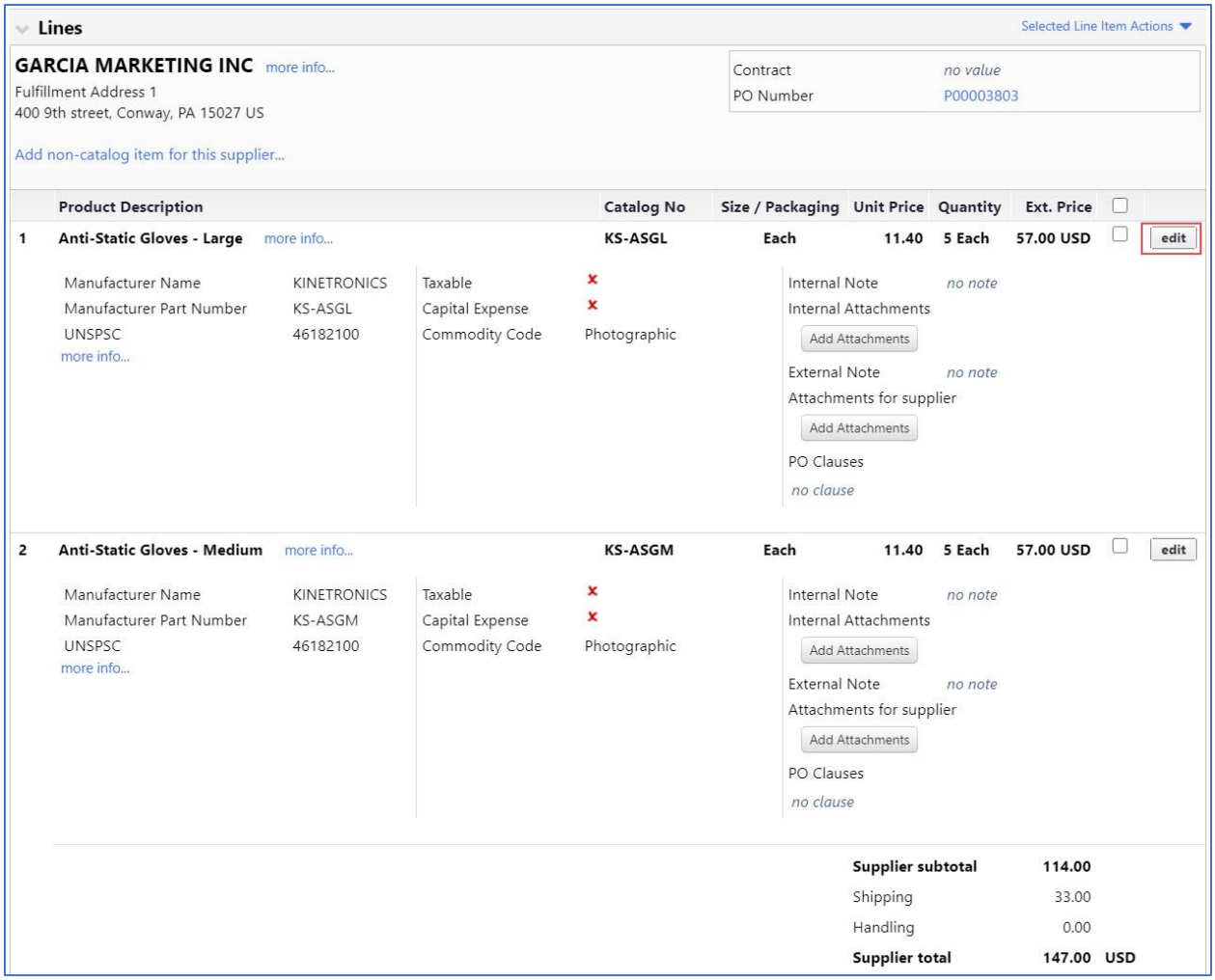


The Create Change Request window will pop-up. From this window, you can send an email notification to someone if needed. This notification is separate from any approval notification the system will send automatically to one of your departmental or purchasing services approvers if your order requires approval.

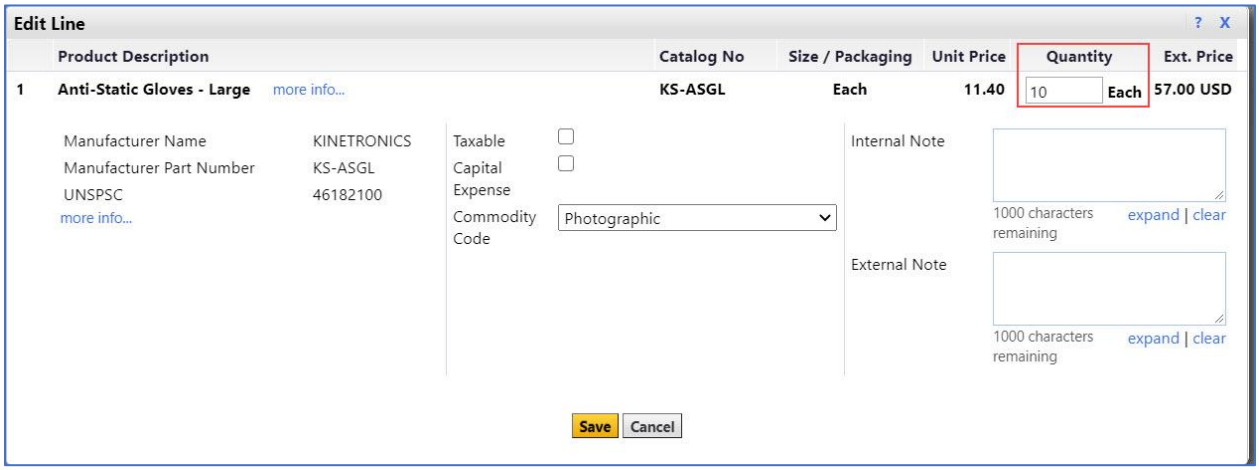
If you do not see the name of the person you wish to email, you can use the “add email recipient” feature to search for the person’s name. If you don’t want to receive notifications, leave this page blank. When ready, select the Create Change Request button in the bottom of the window.



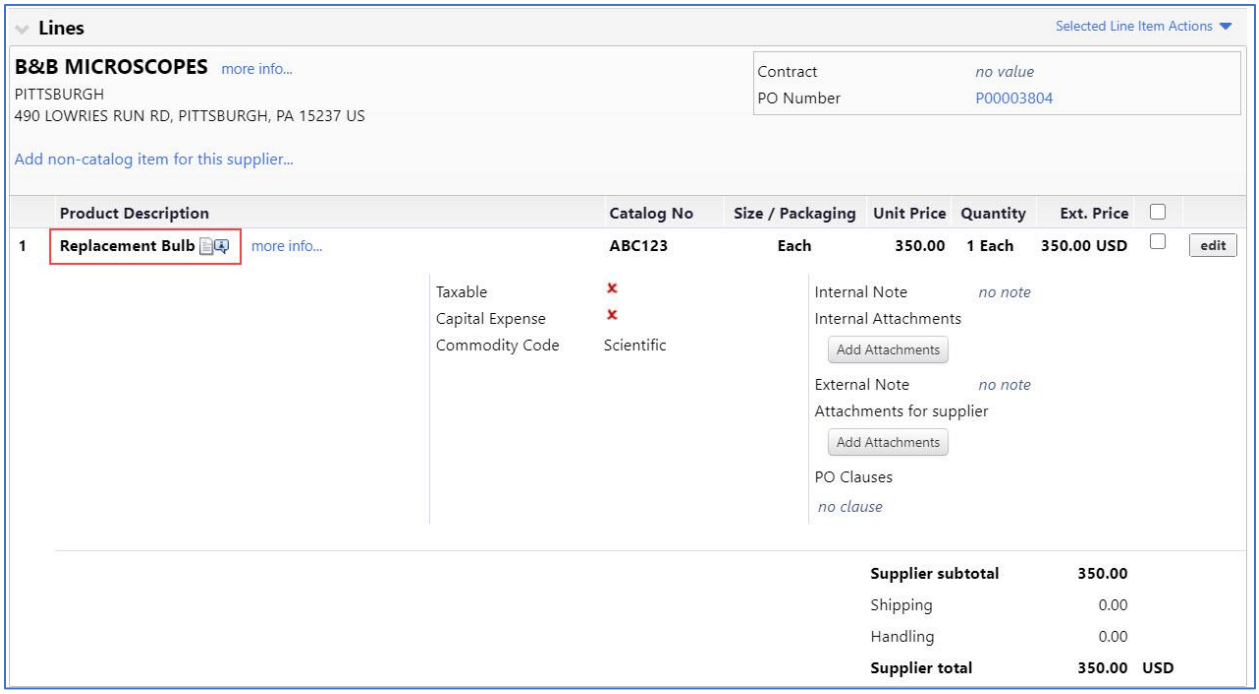
The Change Request Summary page will load. Scroll down to the Lines. If you are making this Change on a Catalog or Punch-Out order, select the Edit button.



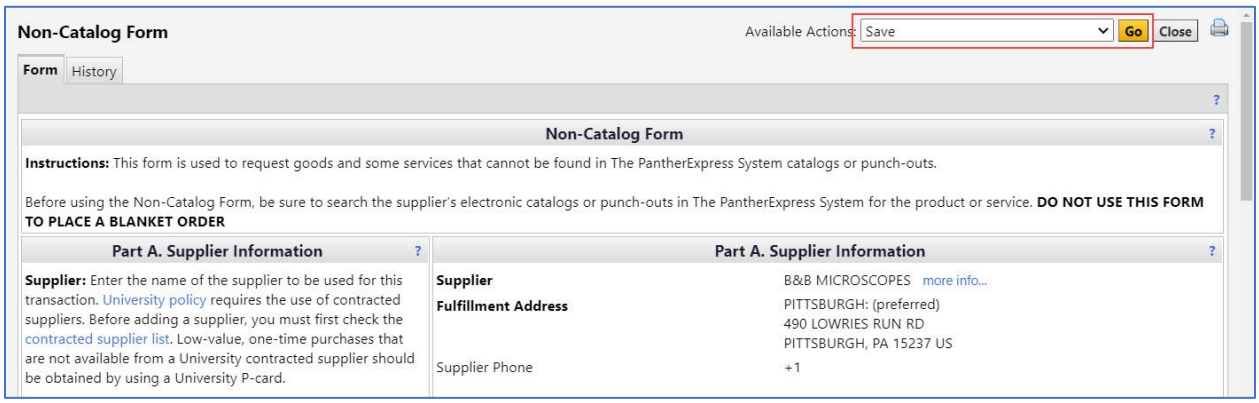
When the Edit Line window opens, update the quantity, then select the Save button.



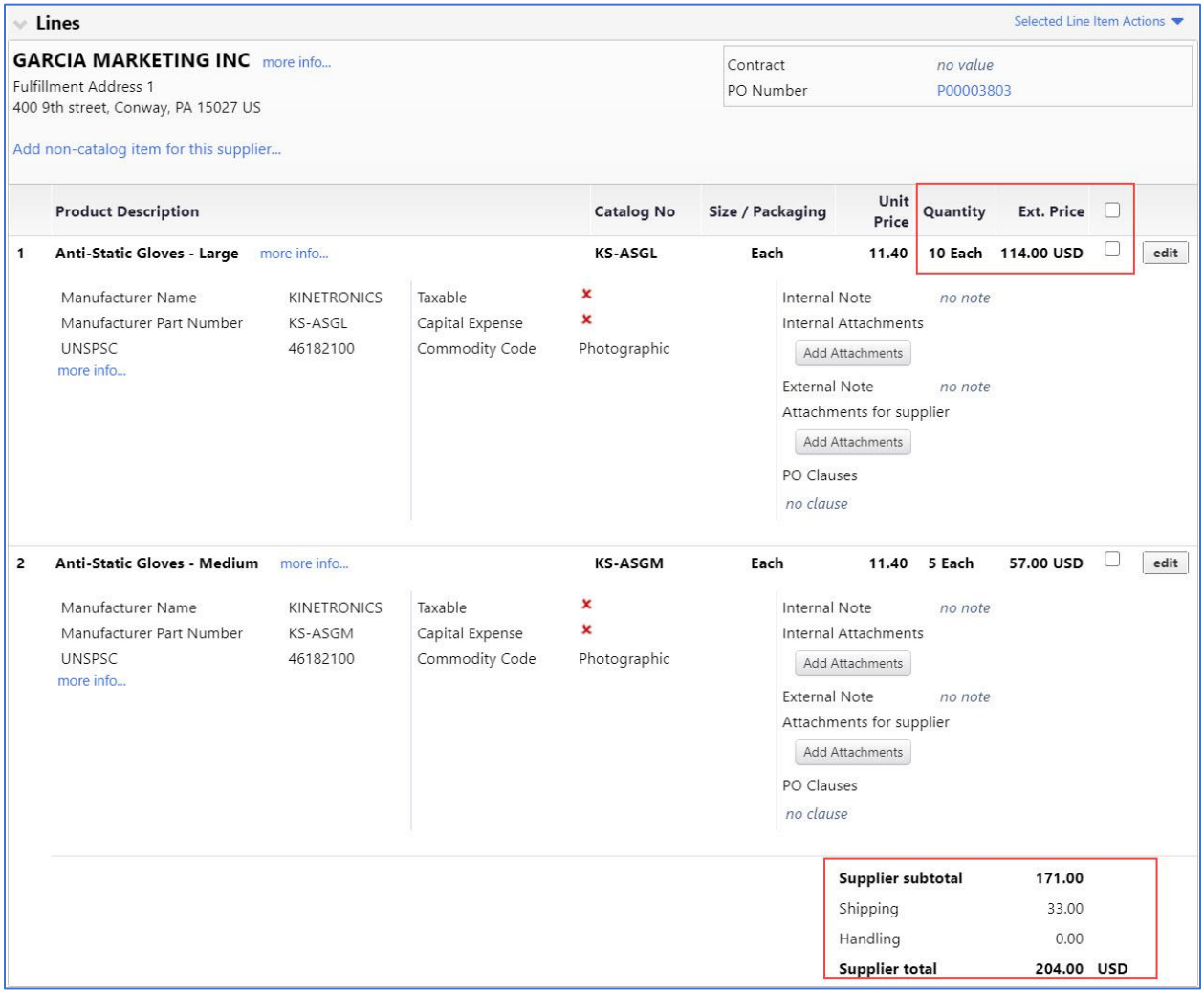
If you are making this Change on a form order, select the line item under Product Description to open the form.



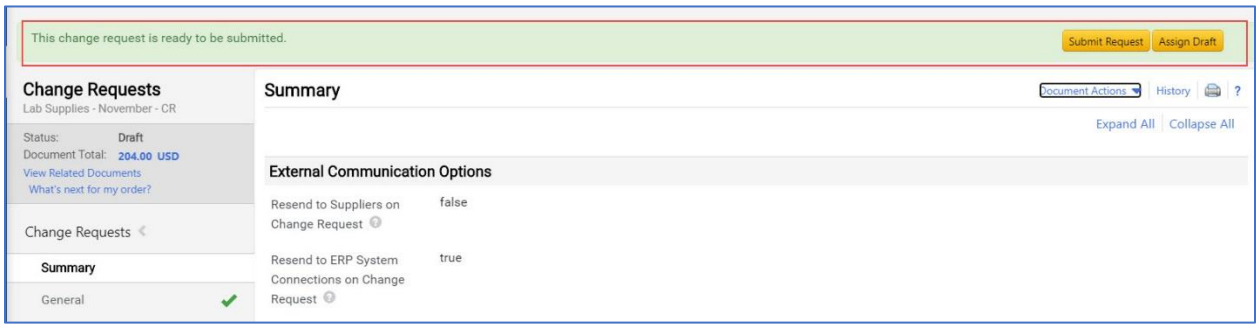
The form will open. Make the required change, then select Save from the dropdown, then Go.



When you return to the Change Request, the Quantity and Ext. Price will have updated.

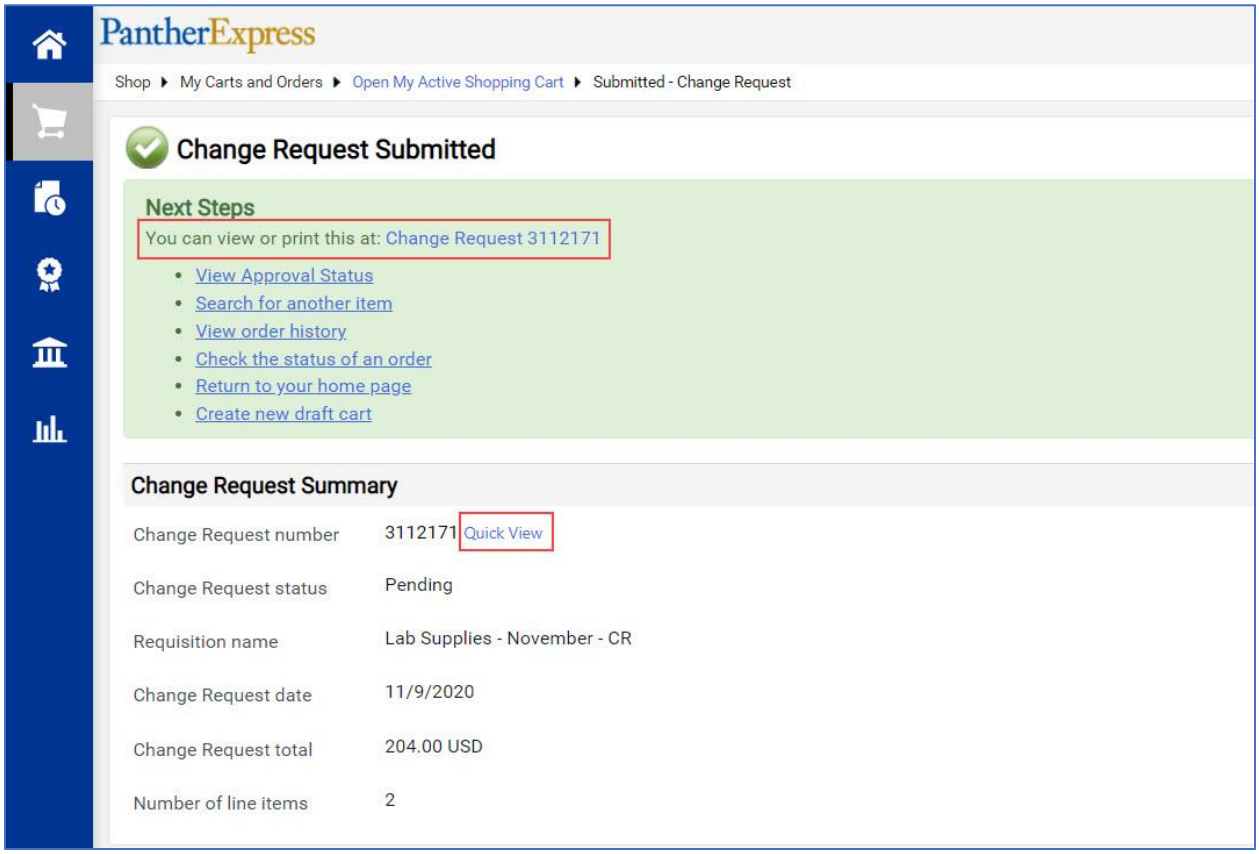


Scroll to the top of the page. You will see a message indicating that the change request is ready to be submitted. Select the Submit Request button to finish the system process.



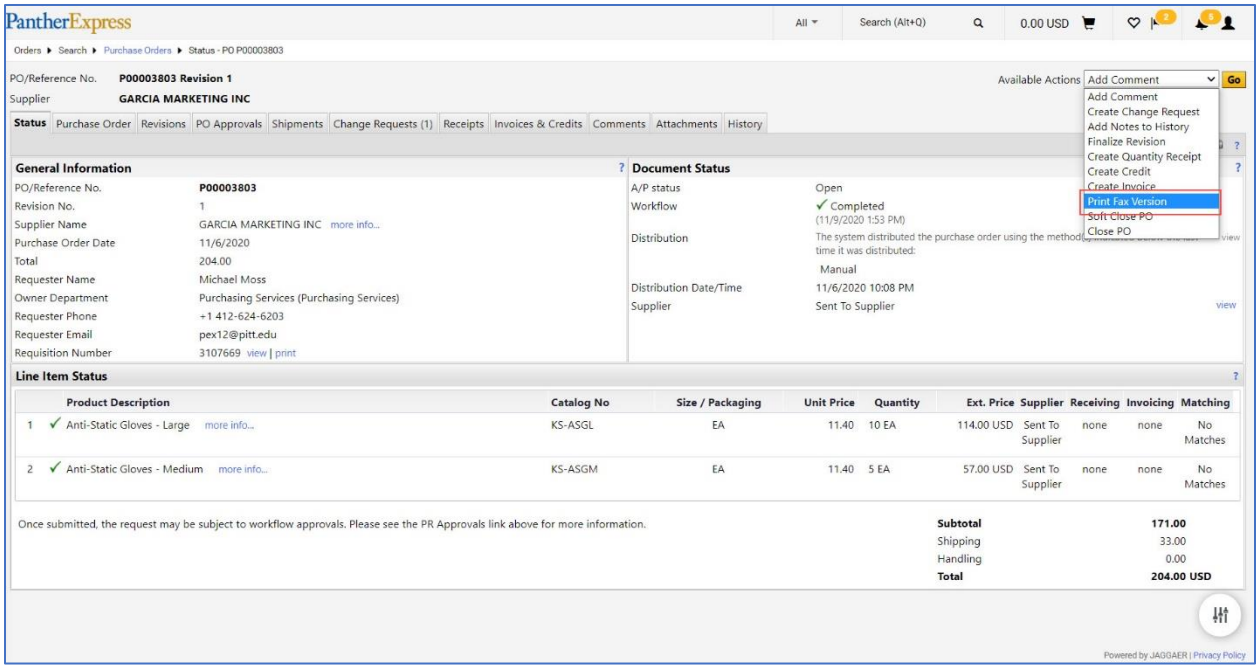
Your Change Request is now submitted. A verification window will pop up showing you successfully submitted the change request. Each change request is given a unique

identification number for you to use as a reference for the request. Selecting the request number from the verification window will open the request, or you can go to the Quick View link to see the request summary.



Note: If you are making this change before invoicing, once the completed change order has been approved, you must contact the Supplier to make sure they are aware of the change. With the approved Change Request, you should generate a printout of the modified Purchase Order and send it to the supplier.

To do this, open the Purchase Order, select “Print Fax Version” from the Available Actions drop-down, and then select the “Go” button.



Adding Purchase Order Line Item

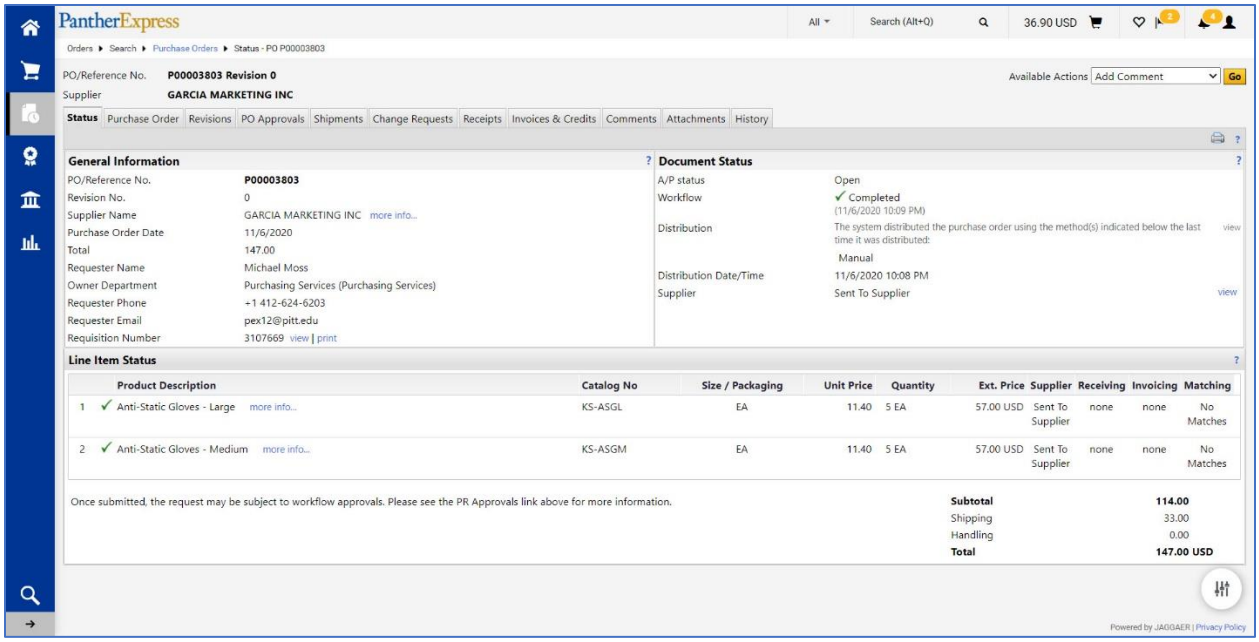
Generally, you shouldn't add lines to a submitted Purchase Order. If you forgot an item when placing an order, those additional items should be purchased using a new Purchase Order.

The only exception to this rule is adding lines to correct a Purchase Order discrepancy. If you need to correct a Purchase Order in this circumstance, you will use the Create Change Request feature to add the line item(s).

Example: The supplier sends you extra items than you ordered and, rather than returning them, you decide to keep them.

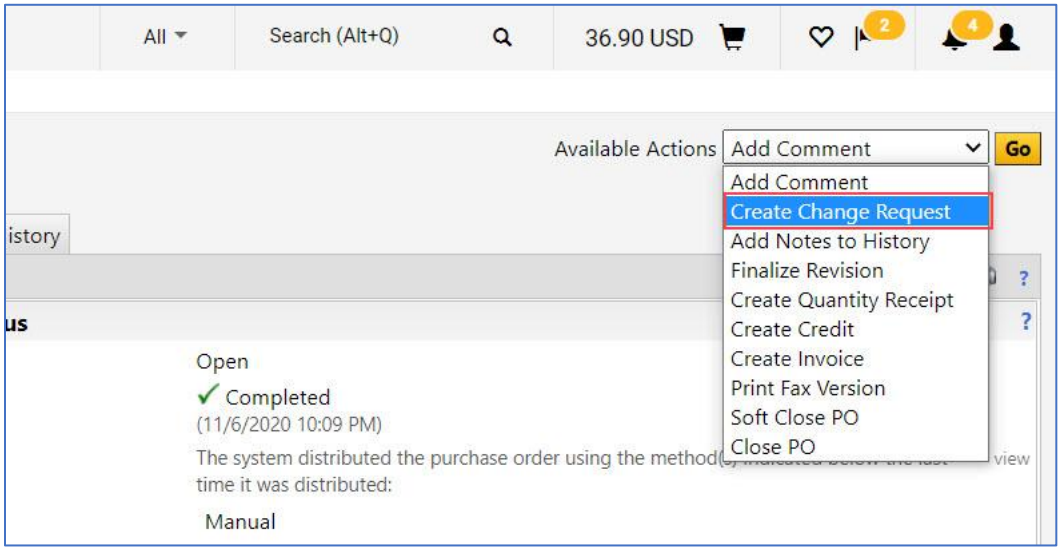
The following method is to add a new item as an additional line to your existing form. To update the quantity of an item already on your Purchase Order, follow the instructions above. Use the following process for all order types.

Open the PO that needs updated.



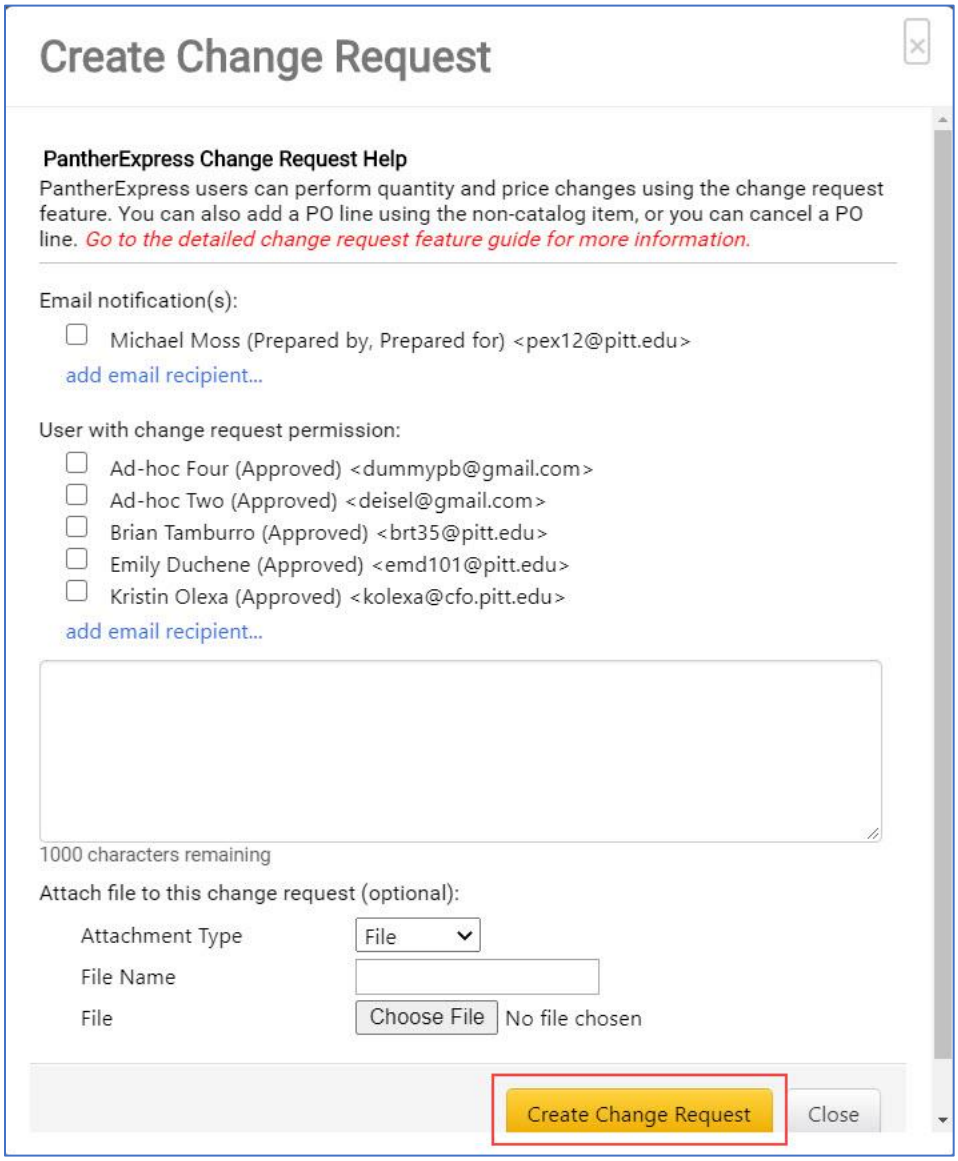
Verify the Invoices and identify the extra line item. You will need the information to add the line to the Purchase Order.

In the top right corner, click on the drop-down arrow for the Available Actions menu, and select Create Change Request, then use the Go button to start the Change Request.

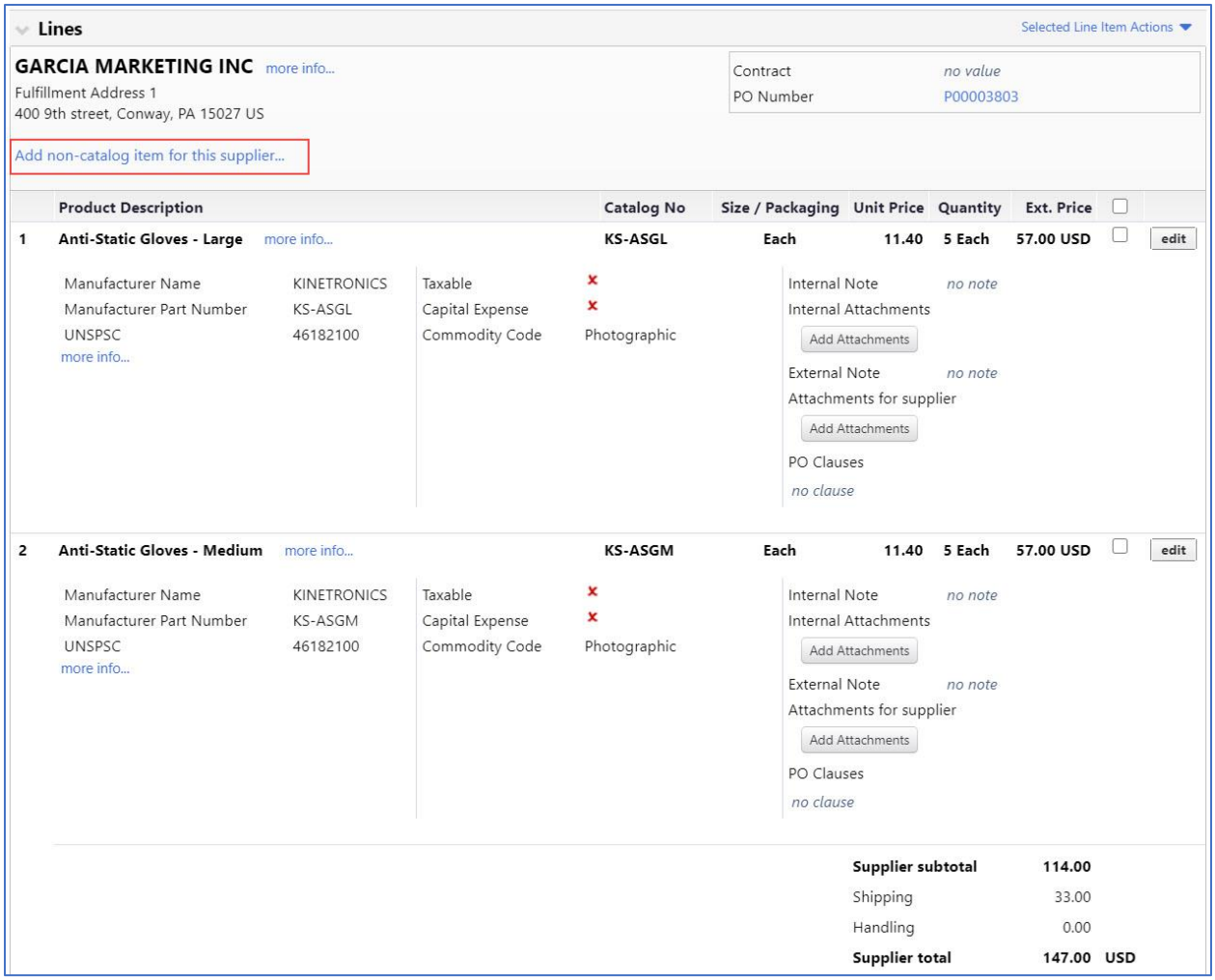


The Create Change Request window will pop-up. From this window, you can send an email notification to someone if needed. This notification is separate from any approval notification the system will send automatically to one of your departmental or Purchasing Services approvers if your order requires approval.

If you do not see the name of the person you wish to email, you can use the “add email recipient” feature to search for the person’s name. If you don’t want to receive notifications, leave this page blank. When ready, select the Create Change Request button in the bottom of the window.



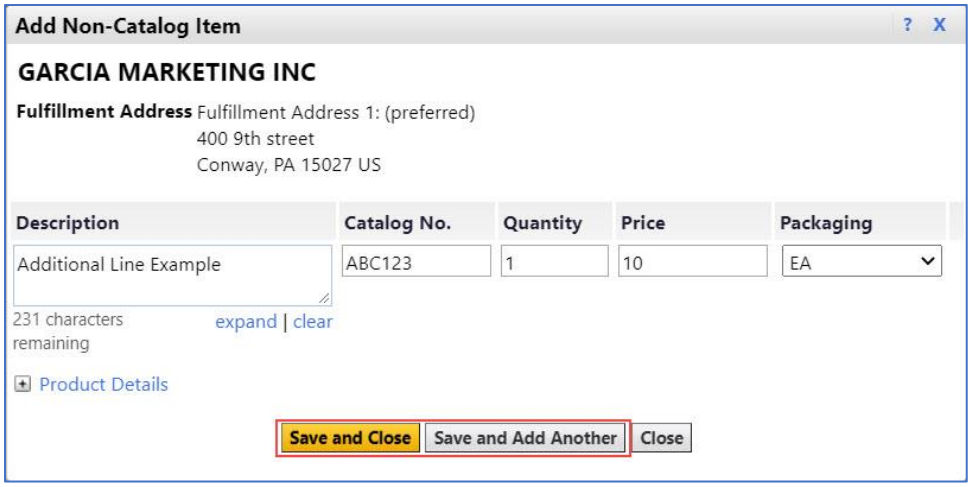
The Change Request Summary page will load. Scroll down to the Line items. Underneath the supplier's name, use the Add non-catalog item for this supplier link to open the Non-catalog Item functionality.



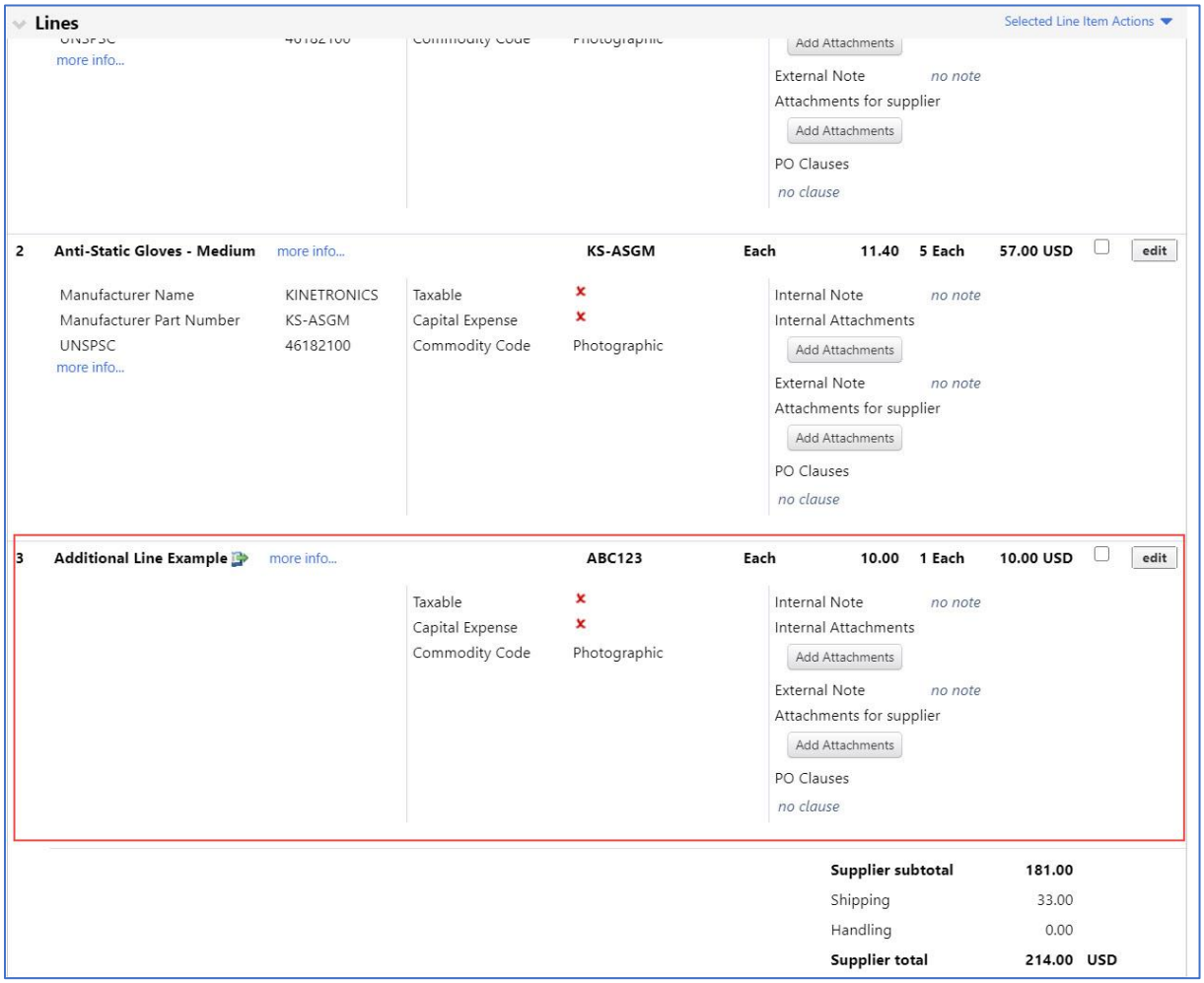
Required fields are indicated with bold text. This includes Product Description, Catalog No., Quantity, Price Estimate and Packaging. Only the Product Details (attachments and checkboxes) are not required.

If you need to add an attachment use the expand link to open the product details and select the Add Internal Attachments button. These attachments will only be visible to Purchasing Services, they are not submitted to the supplier.

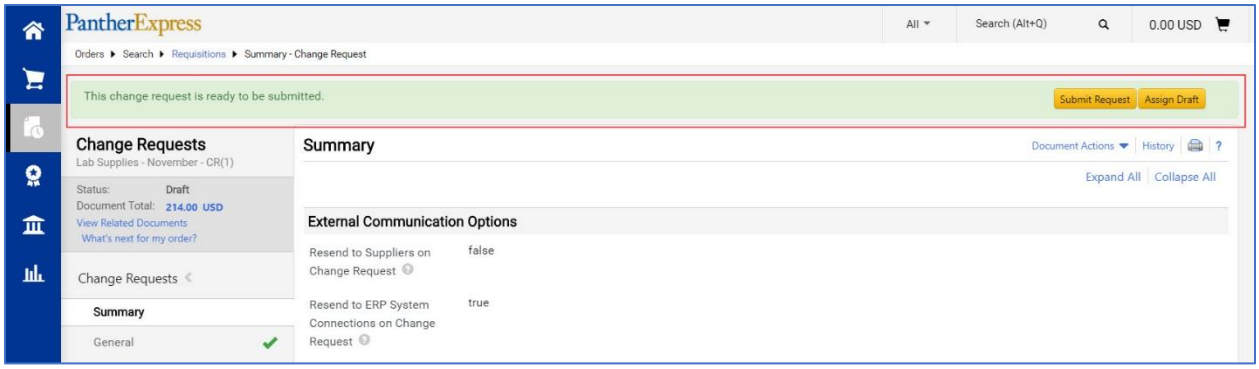
Use the Save and Close button to finish editing. The Save and Add Another button will allow you to add additional lines.



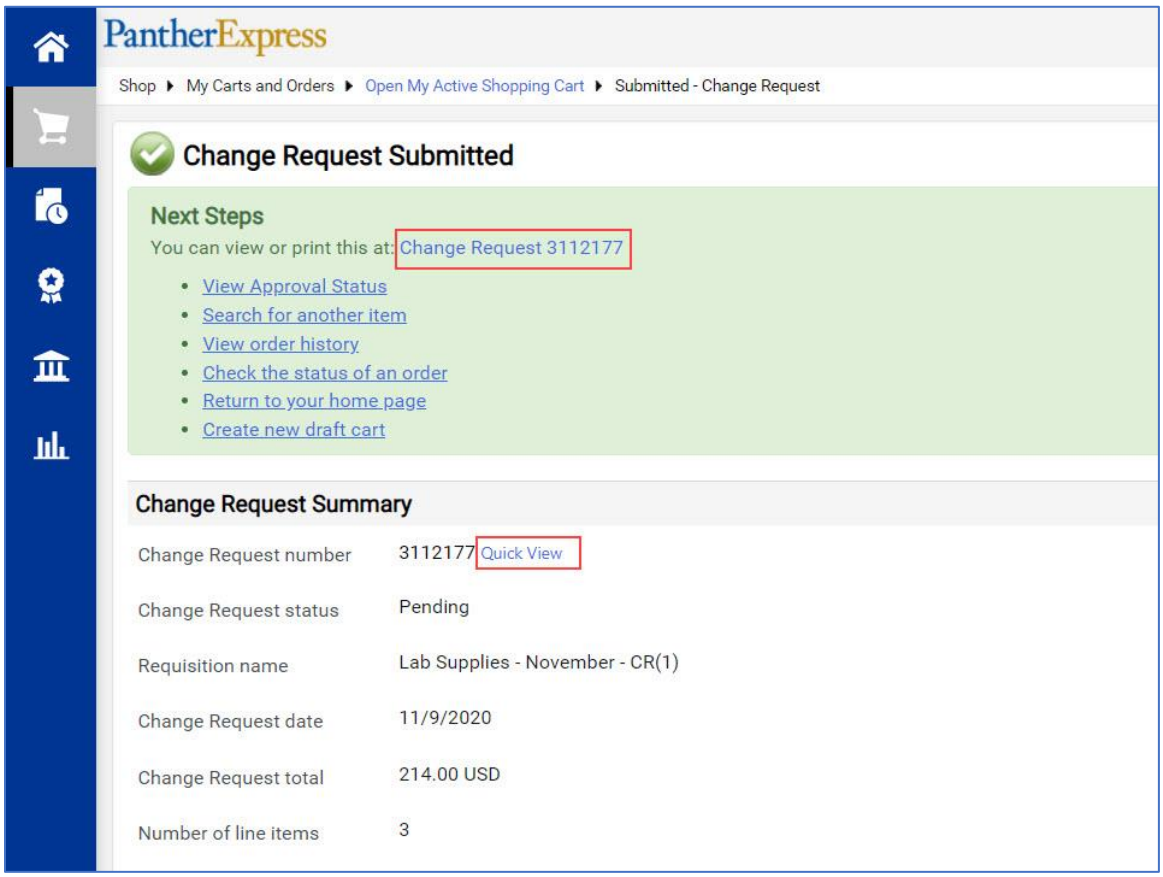
When you return to the Purchase Order, you will be able to review the changes.



Scroll to the top of the page. You will see a message indicating that the change request is ready to be submitted. Select the Submit Request button to finish the system process.



Your Change Request is now submitted. A verification window will pop up showing you successfully submitted the change request. Each change request is given a unique identification number for you to use as a reference for the request. Selecting the request number from the verification window will open the request, or you can go to the Quick View link to see the request summary.



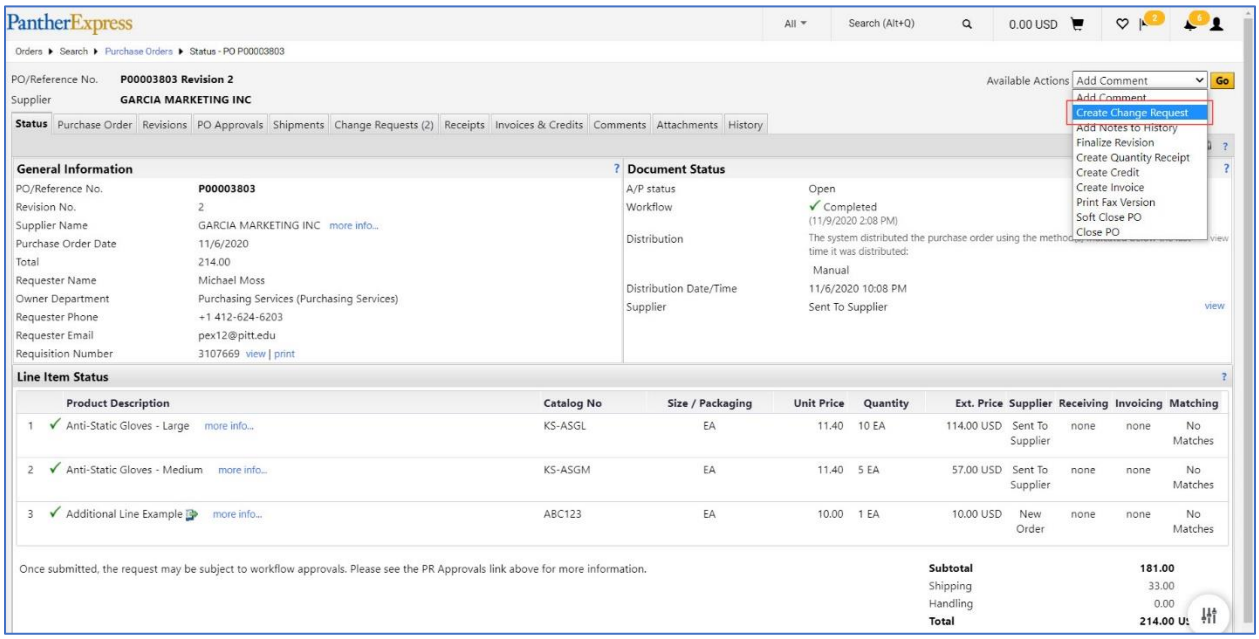
Cancel Purchase Order Line item

You may only cancel an entire line from a Purchase Order, in coordination with the supplier, in the following ways:

- Before invoicing – Use the Change request feature to remove the line.
    - Please note, the Change Request update will not notify the Supplier. Once the Request is approved, generate a printout and contact the supplier, sending them the printout.
- After Invoicing – Contact the supplier first.
    - If the items have already shipped, you will have to return them and receive a credit invoice.

Please note, a cancelled line cannot be un-cancelled. If the supplier did deliver the item, you will need to add the line back by using the Add Non-catalog Item functionality in the Create a Change Request feature.

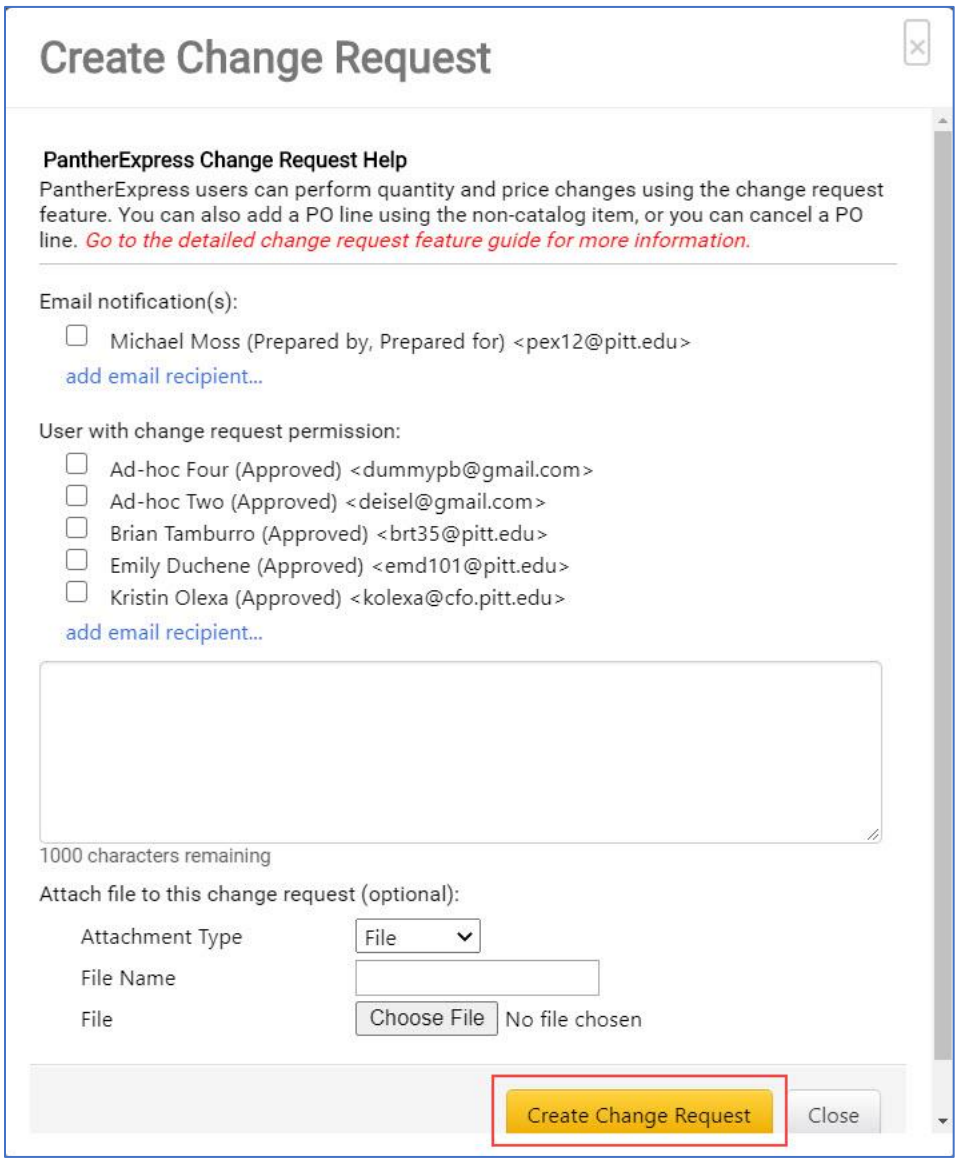
Open the Purchase Order that contains the line that needs to be cancelled. In the top right corner, click on the drop-down arrow for the Available Actions menu, and select Create Change Request, then use the Go button to start the Change Request.



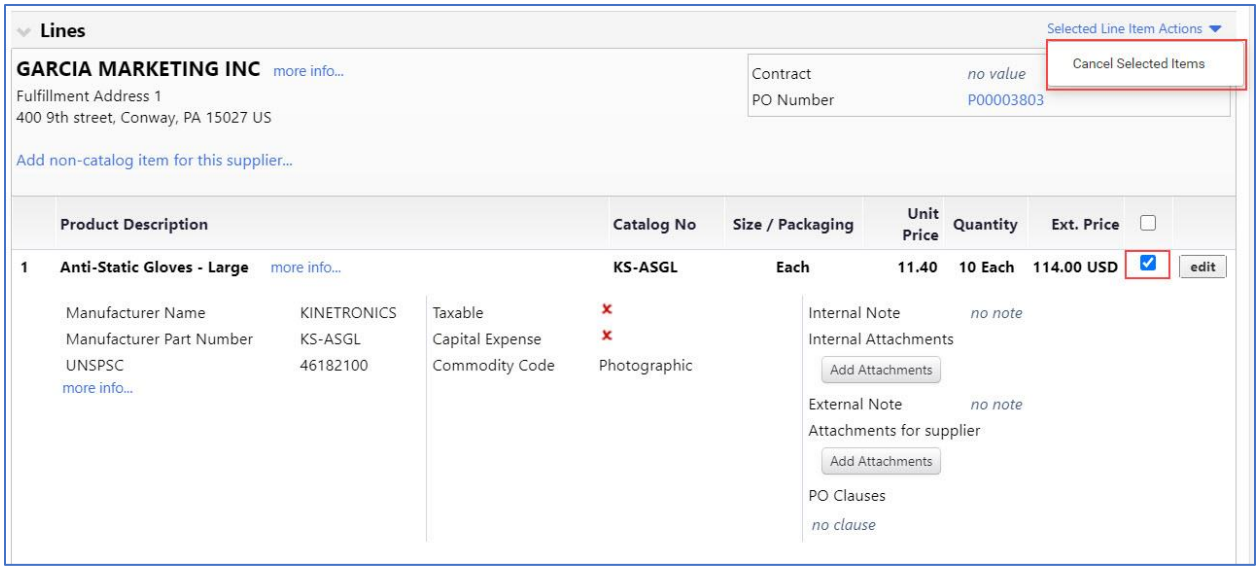
The Create Change Request window will pop-up. From this window, you can send an email notification to someone if needed. This notification is separate from any approval notification the system will send automatically to one of your departmental or purchasing services approvers if your order requires approval. If you do not see the name of the

person you wish to email, you can use the “add email recipient” feature to search for the person’s name.

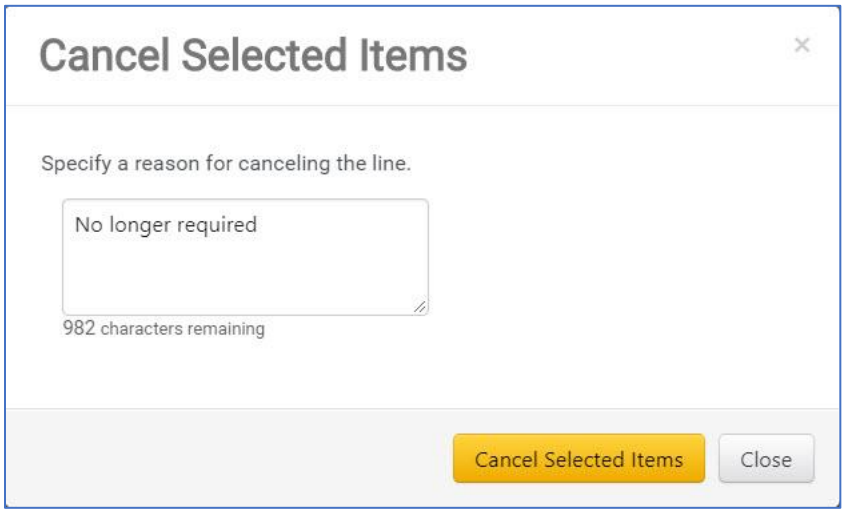
If you don’t want to receive notifications, leave this page blank. When ready, select the Create Change Request button in the bottom of the window.



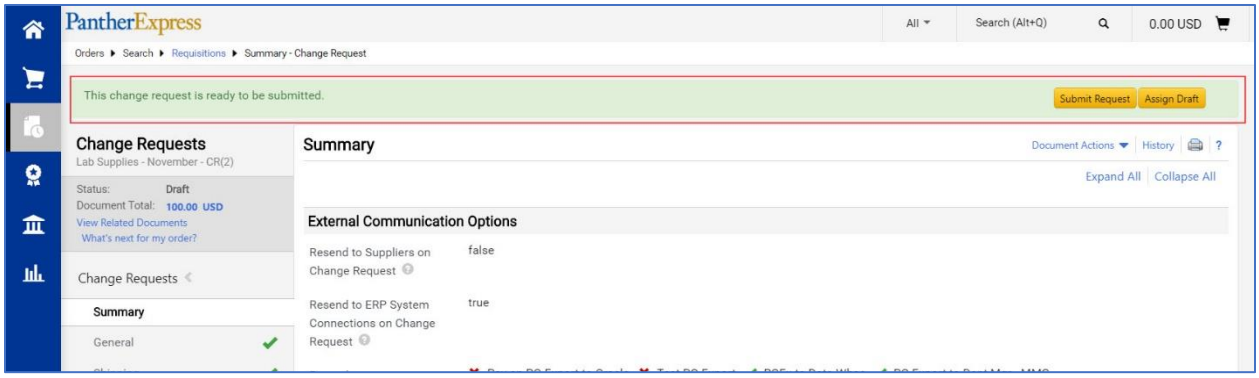
Scroll down to the lines. On the right side, select the line that needs to be cancelled, then click on the Select Line-Item Action dropdown, and select Cancel Selected Items.



A confirmation window appears. Enter the reason you need to cancel this line, then click on Cancel Selected Lines.



Scroll to the top of the page. You will see a message indicating that the change request is ready to be submitted. Select the Submit Request button to finish the system process.



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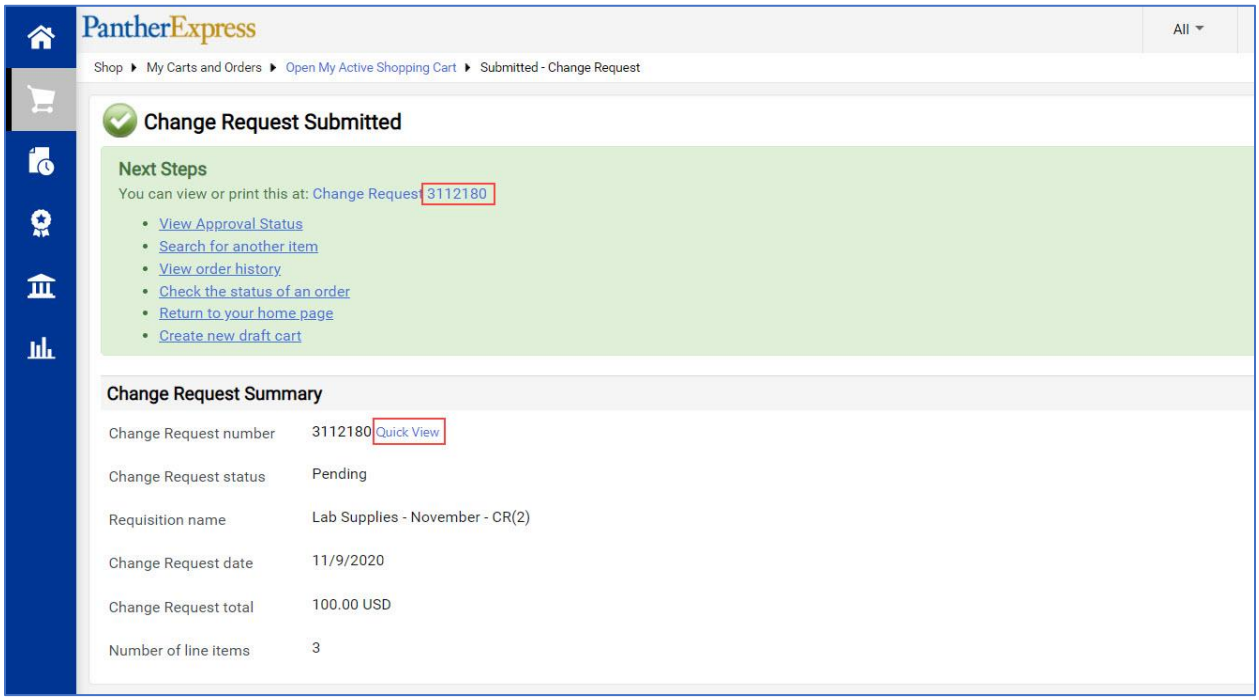
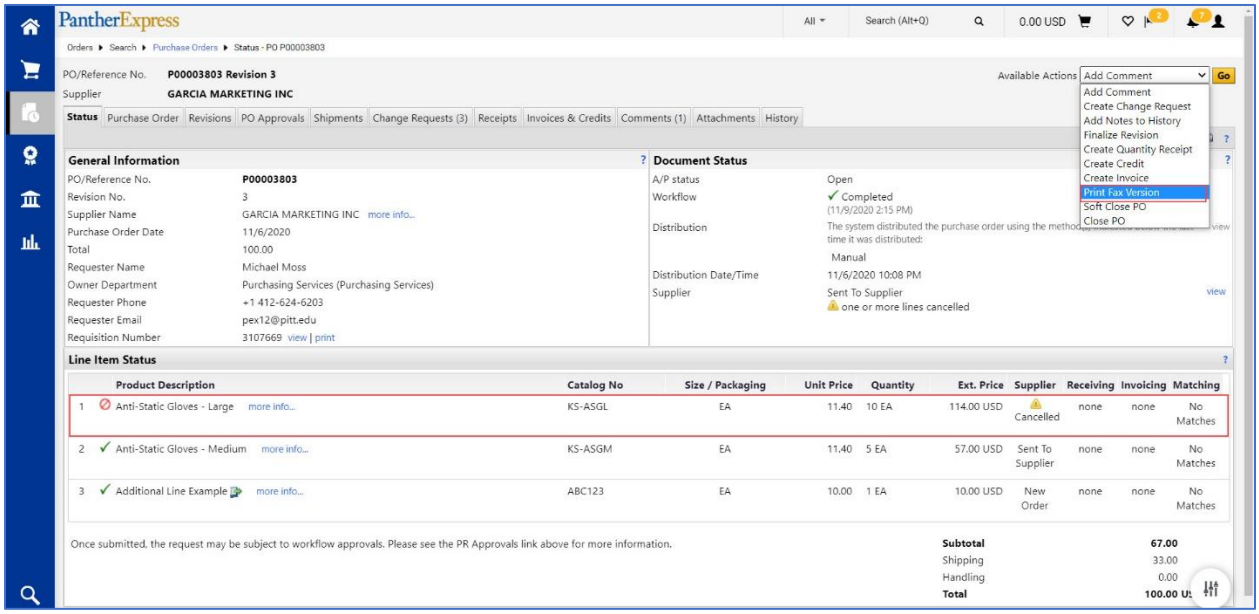


Once the completed change order has been approved, you must contact the Supplier to make sure they are aware of the change. With the approved Change Request, you should generate a printout of the modified Purchase Order and send it to the supplier.

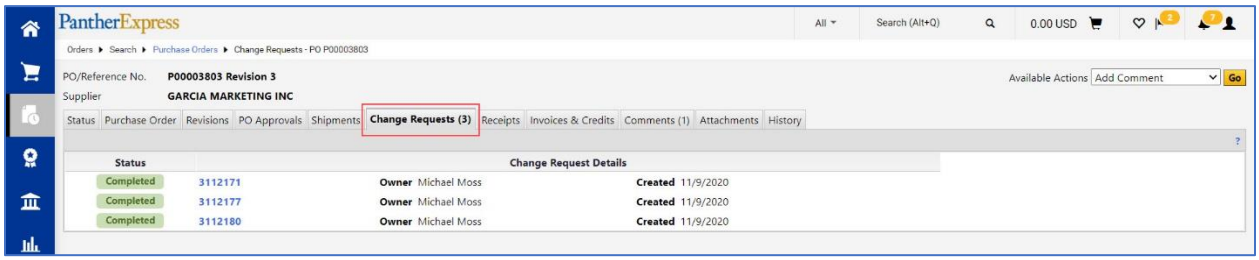
To do this, open the Purchase Order, select “Print Fax Version” from the Available Actions drop-down, and then select the “Go” button.



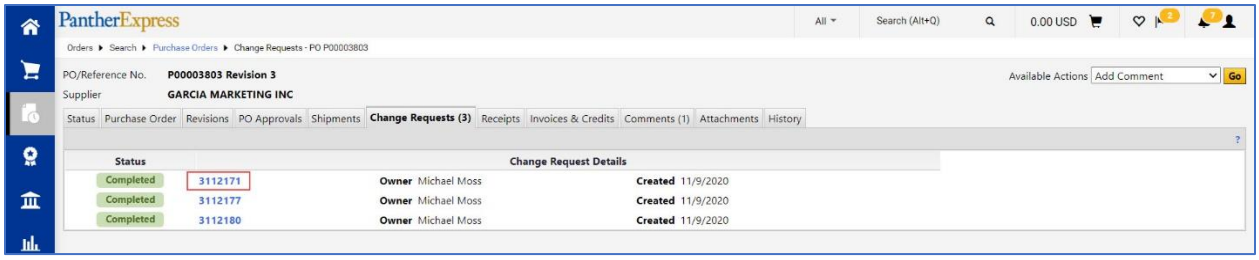
Managing Change Requests

Once a Create Change Request is submitted, the document will go through the same approval process as the requisition. The following steps will allow you to view the Change Request approval process.

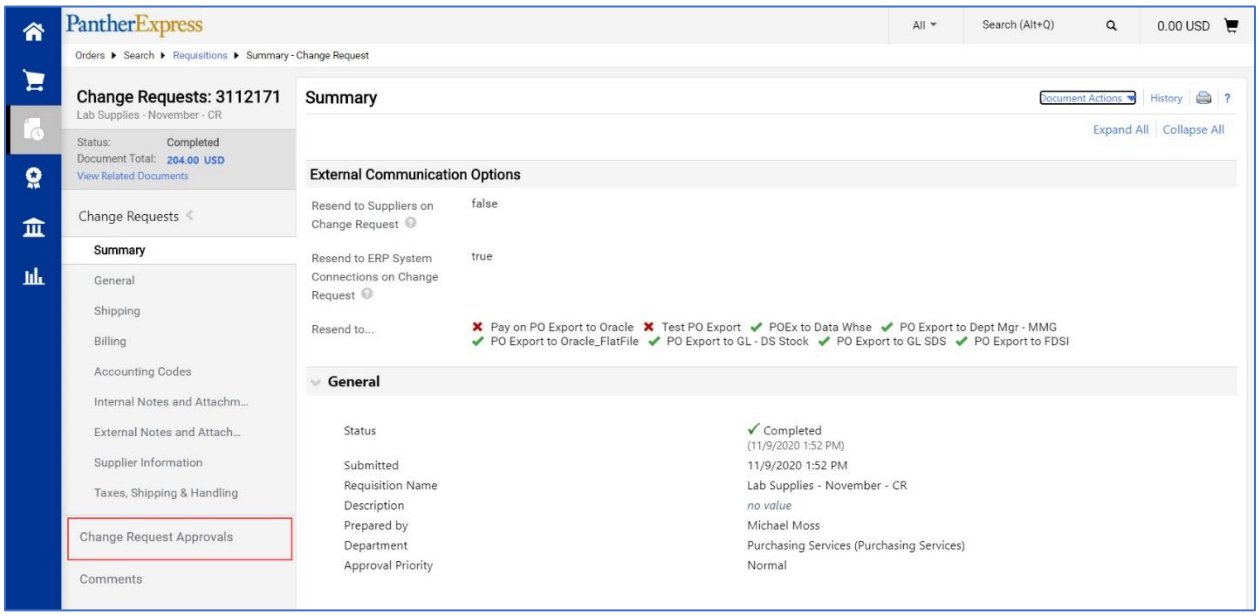
Open the Purchase Order and navigate to the Change Requests tab.



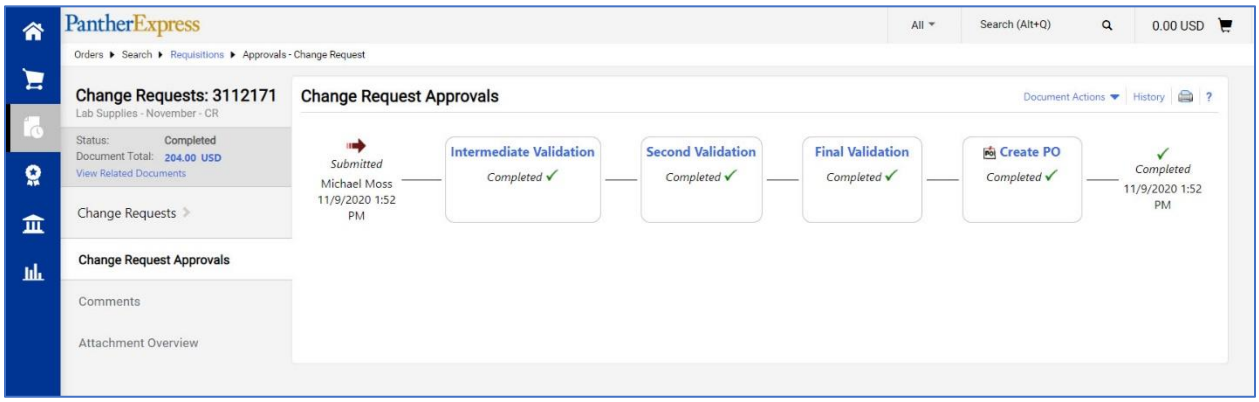
Select the Change Request number.



Navigate to the Change Request Approvals.

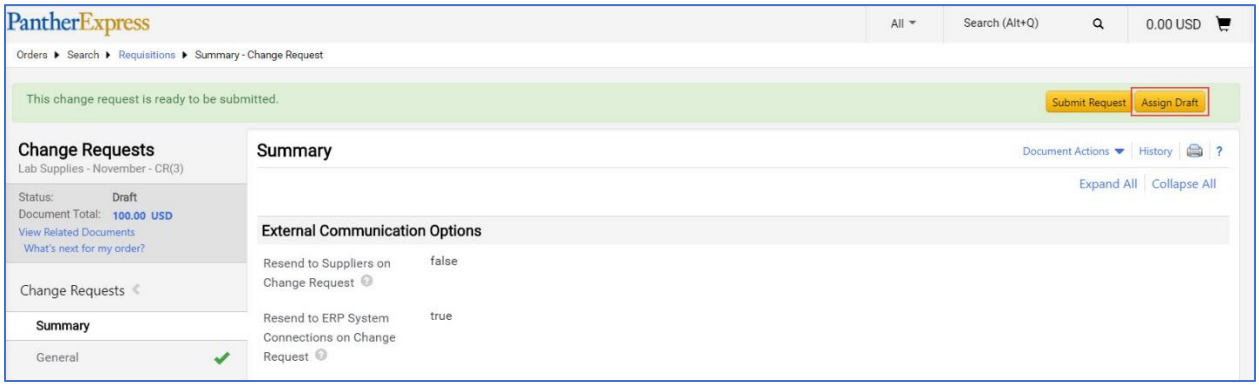


The Change Request Approvals workflow will open and show what has been completed for the workflow. The Submitted and Completed end points provide a timestamp.

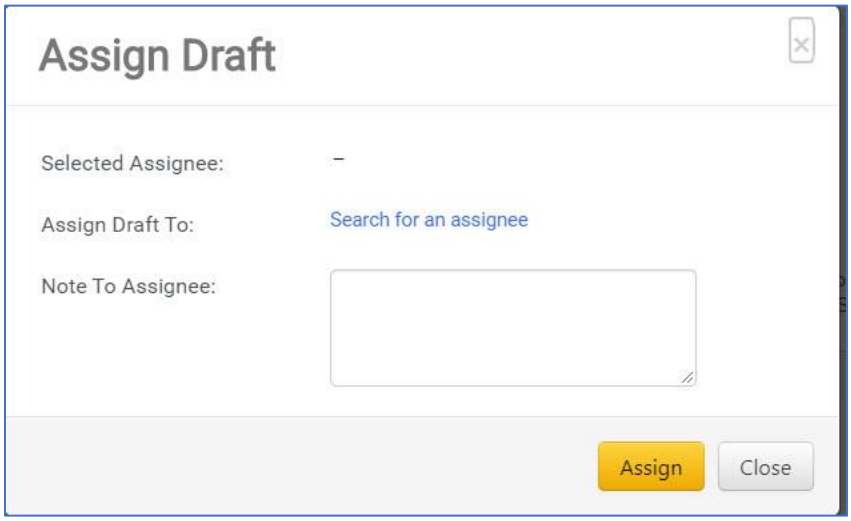


Assigning Change Requests to Others

Once the approval process is completed, a change request can be submitted or assigned to another person as a draft. This is done by using the Assign Draft button in the same notification panel at the top of the page as the Submit Request action.



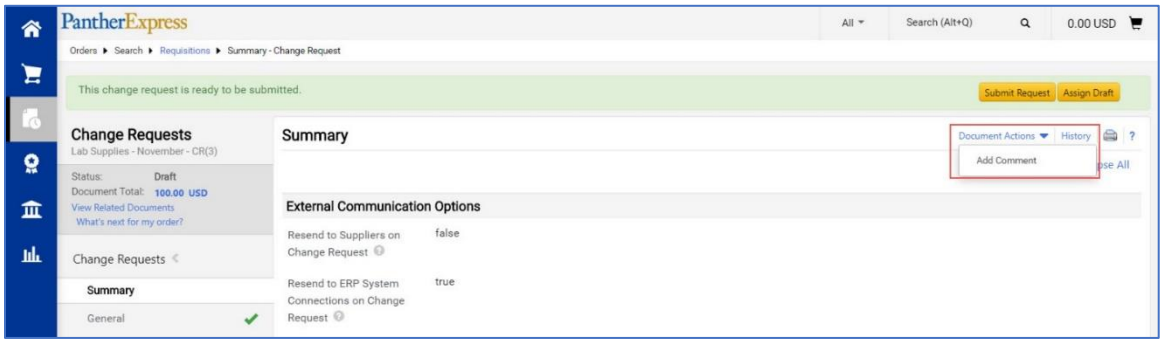
Search for an assignee, then click Assign.



Once the assignee receives the draft, they can submit the Change Request for approval. This may be done by buyers who prepare orders for other buyers.

Adding Comments to Change Requests

A comment can also be placed on the document via the Document Actions drop-down on the same line as the Summary heading of the Change Request Summary page.



Additional Notes

- Change requests are not applied to the Purchase Order until approved. If an approver rejects a Change Request, no change will be made to the Purchase Order.
- While a change request is pending approval, you cannot create another change request against the same Purchase Order. That option will be unavailable until the current change request is no longer pending approval.
- Change requests can be:
    - Withdrawn by the end users
    - Approved by the approver
    - Rejected by the approver

Change Requests Statuses

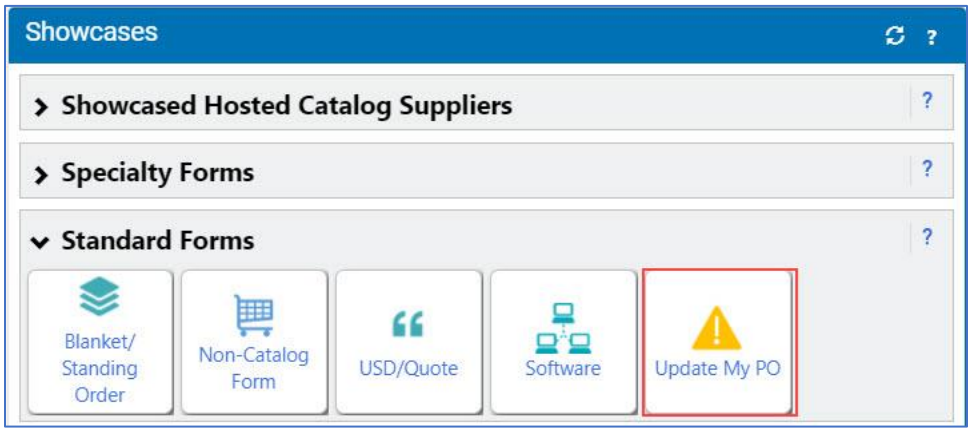
- Pending – The Change Request is pending approval
- Merge – The Change Request was approved, and the requested changes are being made to the Purchase Order but not fully completed
- Completed – The Change Request was approved, and all changes have been made to the Purchase Order
    - Note: The Purchase Order will have a revision number listed
- Returned – The Change Request was returned to the originator
    - Note: The request is now in a draft state and must be resubmitted or deleted before a new Change Request can be made for the Purchase Order
- Rejected – The Change Request was rejected
    - Note: When a Change Request is rejected, no changes are made.

Update My PO form

The Update My PO form is a means for buyers, approvers, and specialty forms users to request certain changes that cannot be made directly by the user, to ensure the integrity of purchase data that is now integrated with the PRISM process. The Update My PO form must be submitted for certain changes to be made by a central processing group.

The Update my PO form should only be used to change the account number, opening a Purchase Order, closing a Purchase Order, and changing the Purchase Order owner. You may also describe an “other” request and the PantherExpress team will do their best to support you. The request may, however, be declined if it is outside established policies or procedures or declined with a recommendation to use the Change Request feature.

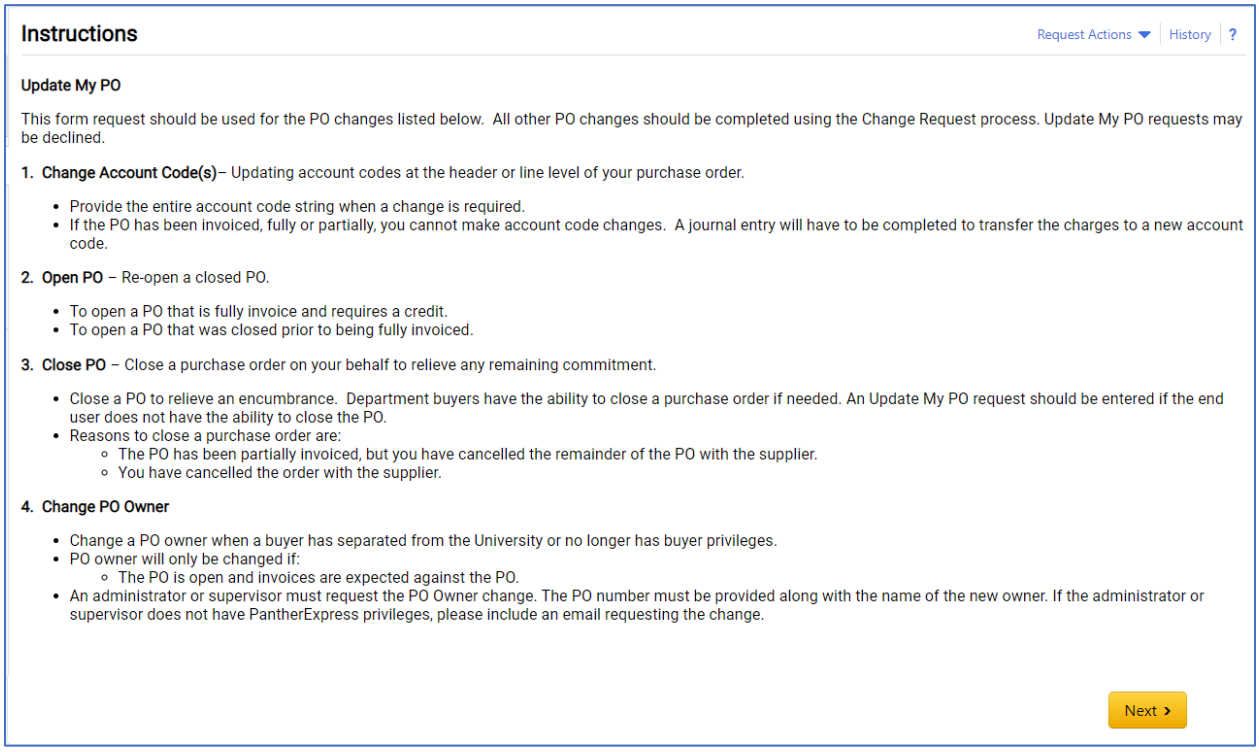
The form can be found on the home screen of the PantherExpress System, in the Standard Forms showcase.



The Update My PO form has multiple screens and uses a wizard-like interface to support the user’s data entry by stepping you through filling out the form. The screens available or required on a form request include Instructions, Attachments, Questions, Review and Submit, and Form Approvals.

Instructions Page

On this page you will find information regarding how the form should be used. The instructions indicate what types of changes may be requested through the Update My PO request. These are shown in the screenshot below and described in the text following.



Instructions

Request Actions | History | ?

Update My PO

This form request should be used for the PO changes listed below. All other PO changes should be completed using the Change Request process. Update My PO requests may be declined.

1. **Change Account Code(s)**– Updating account codes at the header or line level of your purchase order.
   - Provide the entire account code string when a change is required.
   - If the PO has been invoiced, fully or partially, you cannot make account code changes. A journal entry will have to be completed to transfer the charges to a new account code.
2. **Open PO** – Re-open a closed PO.
   - To open a PO that is fully invoice and requires a credit.
   - To open a PO that was closed prior to being fully invoiced.
3. **Close PO** – Close a purchase order on your behalf to relieve any remaining commitment.
   - Close a PO to relieve an encumbrance. Department buyers have the ability to close a purchase order if needed. An Update My PO request should be entered if the end user does not have the ability to close the PO.
   - Reasons to close a purchase order are:
     - The PO has been partially invoiced, but you have cancelled the remainder of the PO with the supplier.
     - You have cancelled the order with the supplier.
4. **Change PO Owner**
   - Change a PO owner when a buyer has separated from the University or no longer has buyer privileges.
   - PO owner will only be changed if:
     - The PO is open and invoices are expected against the PO.
   - An administrator or supervisor must request the PO Owner change. The PO number must be provided along with the name of the new owner. If the administrator or supervisor does not have PantherExpress privileges, please include an email requesting the change.

Next ›

- ### Change Account Code(s)

This type of change allows you to update the account codes at the header or line level of your Purchase Order. To submit this request. you must provide the entire account code string when the change is required and before any invoicing has taken place.

If the Purchase Order has been invoiced (either partially or in full) your Update My PO form will be rejected. To change an account code on a Purchase Order that has been invoiced, you must submit a journal entry to transfer the charges to a new account code. You can find details on journal entries here: https://prism.pitt.edu/training/training-manuals/

- ### Open Purchase Order

You may use the Update My PO form to re-open a closed Purchase Order. You would do this to:

    - Open a Purchase Order that is fully invoiced and requires a credit.
    - Open a Purchase Order that was closed prior to being fully invoiced.

- Close Purchase Order

Department buyers can close a Purchase Order that will not automatically close by using the Update My PO form.

Reasons to close a Purchase Order using the Update My PO form:

    - The Purchase Order has been partially invoiced, but you have cancelled the remainder of the Purchase Order with the supplier.
    - You have cancelled the order with the supplier.

If you need to relieve committed funds (an encumbrance) due to a quantity or price discrepancy, the purchaser can make these changes using the Create Change Request functionality.

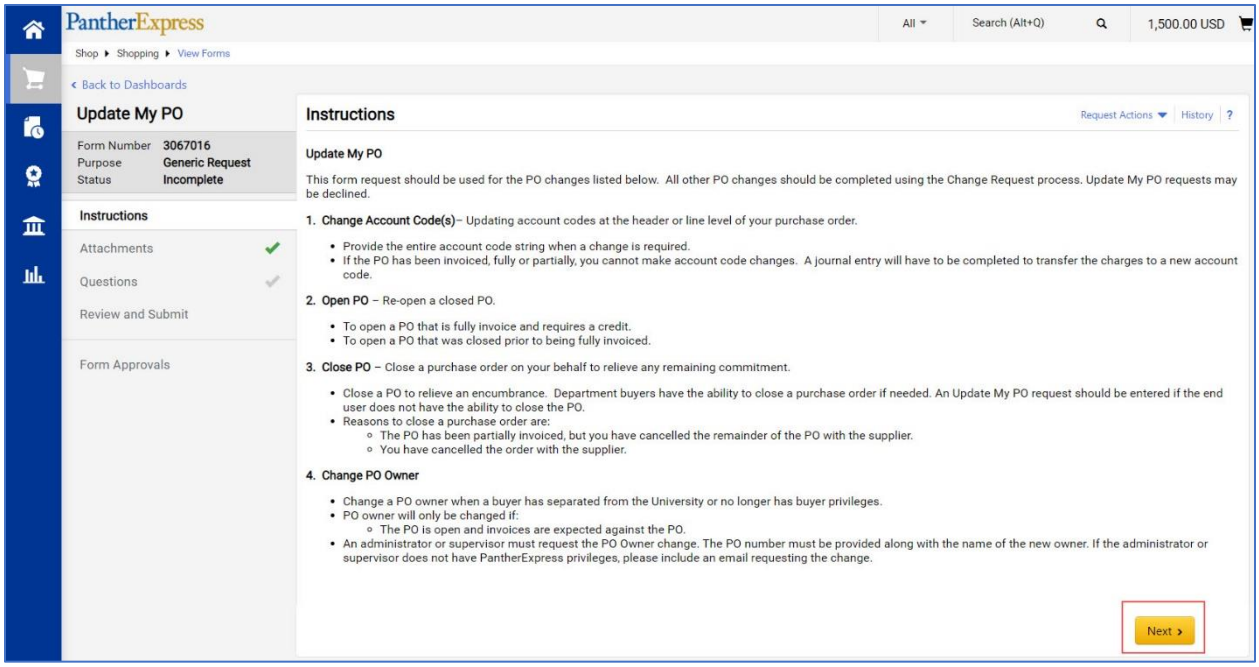
- Change Purchase Order Owner

You may use the Update My PO form to change a Purchase Order owner when a buyer has separated from the University or no longer has buyer privileges. The Purchase Order owner will only be changed if the Purchase Order is open and invoices are expected against the Purchase Order.

An administrator or supervisor must request the Purchase Order Owner change and the Purchase Order number must be provided along with the name of the new owner.

If the administrator or supervisor does not have PantherExpress System privileges, please attach an email from the supervisor requesting the change.

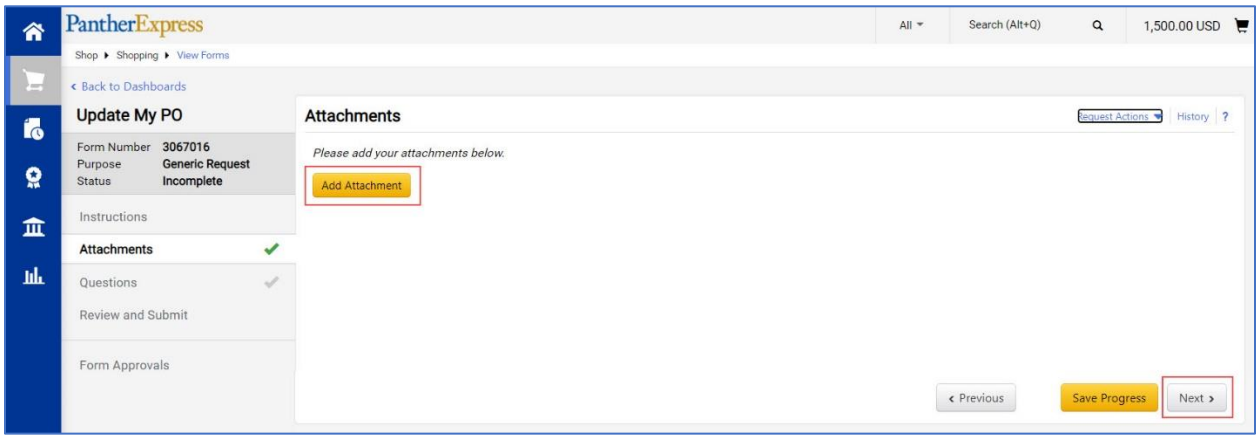
After you have read the instructions form and are certain that the update you are requesting should be made using this form, use the Next button at the bottom right of the page to start filling out the form.



Attachments

Use the Attachments page to provide justification of the change, if needed. This part of the form is optional.

To add attachments, select the Add Attachment button, then select Next.



Questions

The Questions page has required information that must be provided, indicated with the star at the end of the question.

- You must enter the Purchase Order number of the Purchase Order you would like to update.

    - If the Purchase Order number you enter is invalid, the Update My PO form will be returned or rejected.
- You must select at least one type of change you are requesting.
    - You may select more than one type of change on the same form.
    - Depending on the type of update you are requesting, additional fields will appear on this screen.

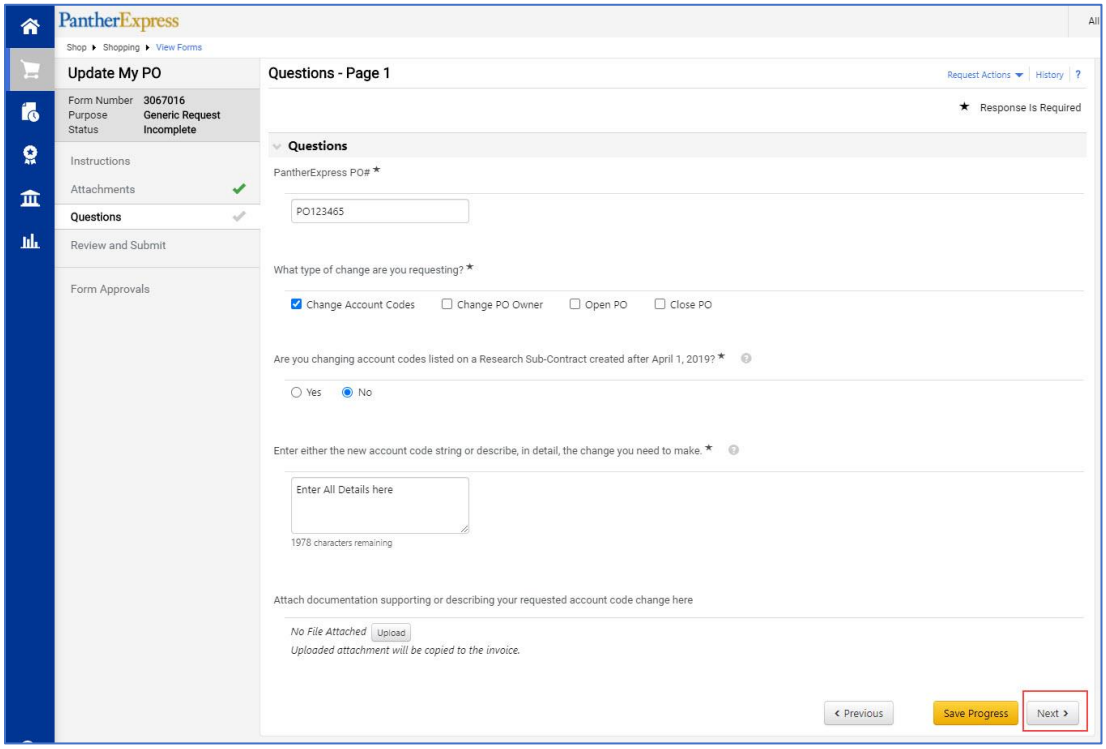
Please provide all the needed information in order to have your Update made. If you leave any required field empty you will receive an error and will need to complete the field before you can submit your request.

When you have entered all required information along with any additional information you wish to provide, use the Save Progress button to save the data you have entered or the Next button to move on to the Review and Submit screen. Both buttons appear at the bottom of the Questions screen.

Change Account Codes

Enter either the new code string or describe, in detail, the change you need to make using the text box provided. You must enter something in the text box.

You also have the option to attach documentation supporting or describing your requested account code change using the Upload button on this screen.

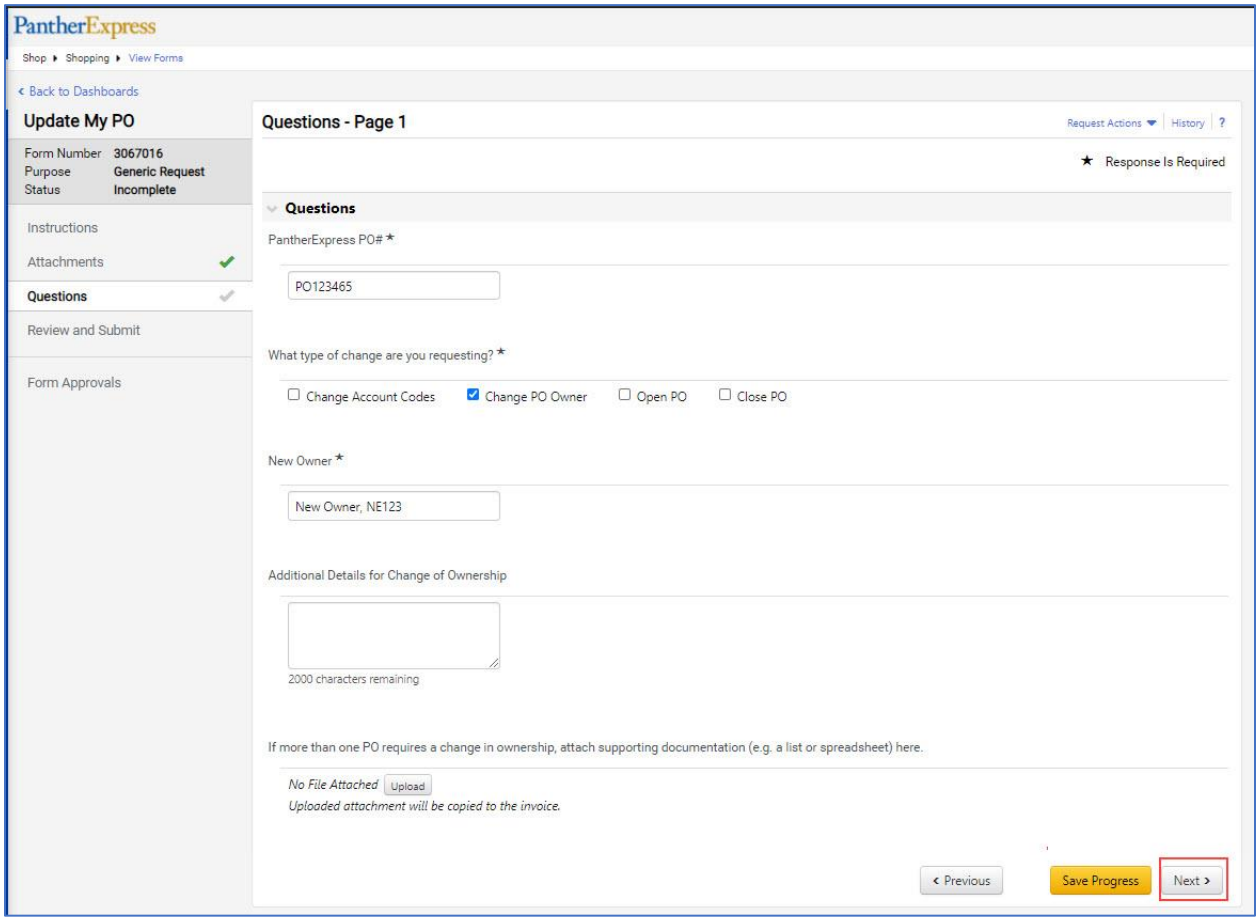


When you have entered all required information along with any additional information you wish to provide, use the Save Progress button to save the data you have entered or the Next button to move on to the Review and Submit screen. Both buttons appear at the bottom of the Questions screen.

Change Purchase Order Owner

Enter the New Owner name, including Pitt ID when possible. This information is required.

You may also enter Additional Details for Change of Ownership in the text box.

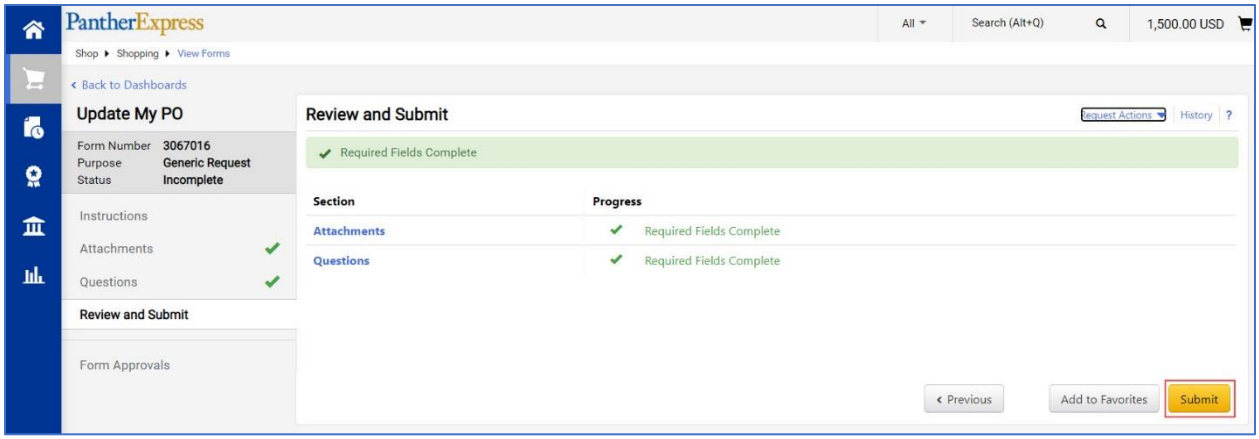


Review and Submit

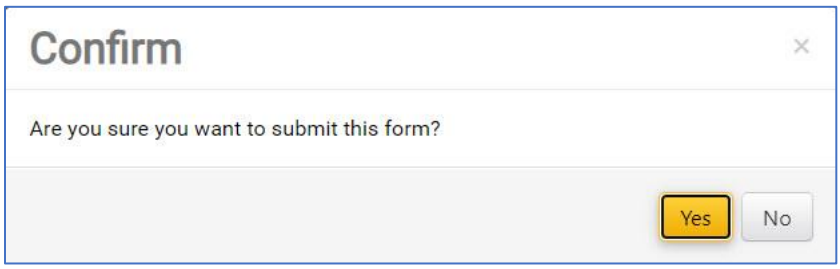
On this page you can see a summary showing what screens have been completed.

- If a required field is not completed, a warning will appear on this screen. Select the screen with the error to correct it.
- If this shows all required fields have been completed, the Submit button will be available.

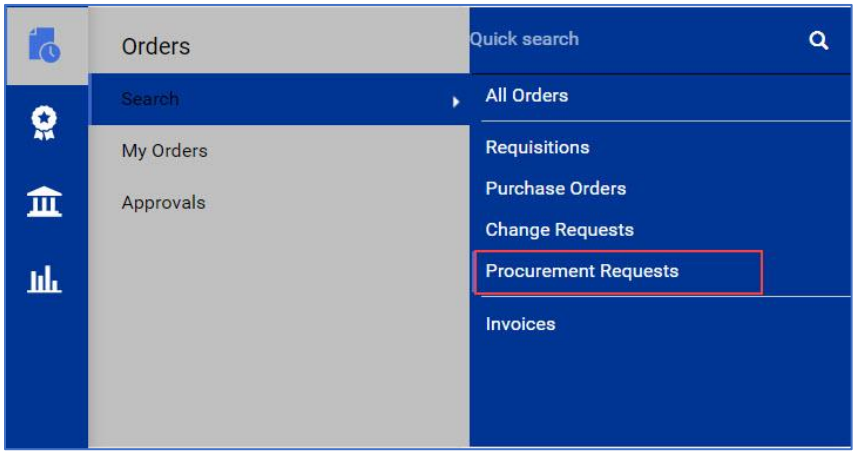
Use the Submit button to submit the form.



A confirmation window will pop up. If you are sure you want to submit this form, select Yes. If you wish to return to the form, select No.

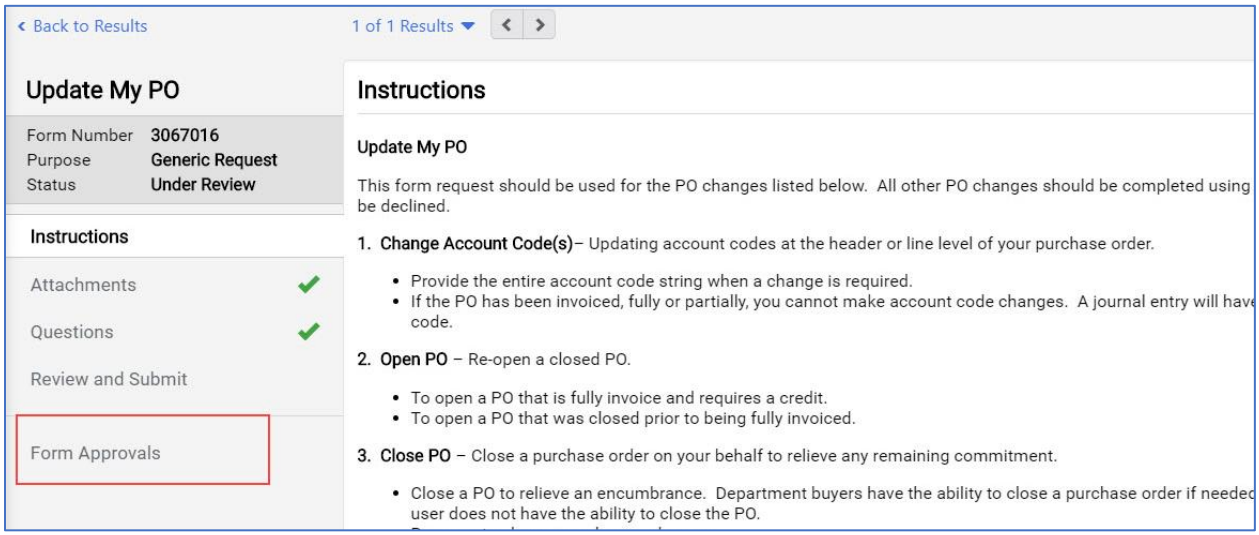


After submitting, a notification message will indicate that the submission was successful. You can find your submitted Update My PO form requests in your Orders/Procurement Requests

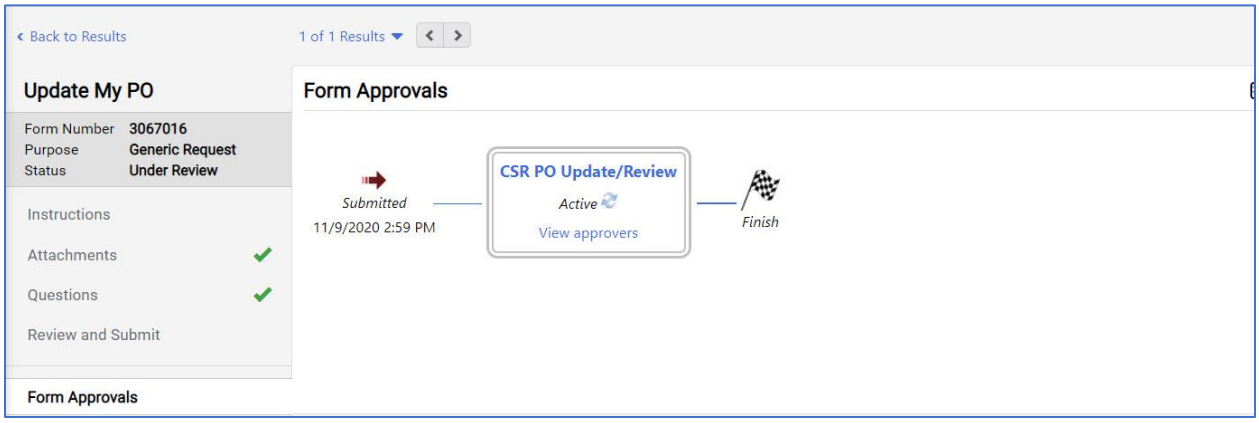


Reviewing Approvals

To review the Update My PO approval workflow, select Form Approvals from the menu on the left.



- This page shows the workflow process associated with the form.
- It will indicate if the form is pending approval, approved, or rejected.
- Submitted and Completed steps include a time stamp.



Email Notifications

The user submitting an Update My PO form will receive an email notification from the system for the following status changes:

- Request is pending approval.
- Request rejected.
- Request approved.

Summary Table for Updating Purchase Orders

Can I update an account code?	Hosted Catalog	Punchout	Non-Catalog	USD/ Quotes	Blanket Order	Services Agreement
Before Invoicing	**Yes** – Use the Update My PO form to complete this change					
After Invoicing	**No** – Submit a Journal Entry after the commitment has been relieved to change the account code				**Yes –** As long as it is the same fiscal year	**Yes -** Use the Update My PO form to complete this change

Can I update the price?	Hosted Catalog	Punchout	Non-Catalog	USD/ Quotes	Blanket Order	Services Agreement
Before Invoicing	**NA**		**Yes** – Use the Create Change Request feature to adjust the price			
After Invoicing	**NA**		**No** Only exception to rule is correcting a NOID.		**Yes** – As long as it is the same fiscal year. Create Change Request	**Yes** – Use the Create Change Request feature to adjust the price

Can I add to item quantity?	Hosted Catalog	Punchout	Non-Catalog	USD/ Quotes	Blanket Order	Services Agreement
Before Invoicing	**Yes** – Use the Create Change Request feature to adjust the quantity				**NA**	
After Invoicing	**No** – Instead you must create a new order. Only exception to rule is correcting a NOID.				**NA**	

Can I reduce item quantity?	Hosted Catalog	Punchout	Non-Catalog	USD/ Quotes	Blanket Order	Services Agreement
Before Invoicing	**Yes** – Use the Create Change Request feature to adjust the quantity				**NA**	
After Invoicing	**No –** You may cancel it from shipping, then receive a credit. If shipped, return for a Credit				**NA**	

Can I add a new line?	Hosted Catalog	Punchout	Non-Catalog	USD/ Quotes	Blanket Order	Services Agreement
Before Invoicing	**No** – Instead you must create a new order.				**NA**	
After Invoicing	**No** – Instead you must create a new order. Only exception to rule is correcting a NOID.				**NA**	

Can I remove a line(s)?	Hosted Catalog	Punchout	Non-Catalog	USD/ Quotes	Blanket Order	Services Agreement
Before Invoicing	**Yes** – Use the Create Change Request feature to adjust the quantity. **Note: Cancelled Lines cannot be un-cancelled**				**NA**	
After Invoicing	**No –** You may cancel it from shipping, then receive a credit. If shipped, return for a Credit.				**NA**	

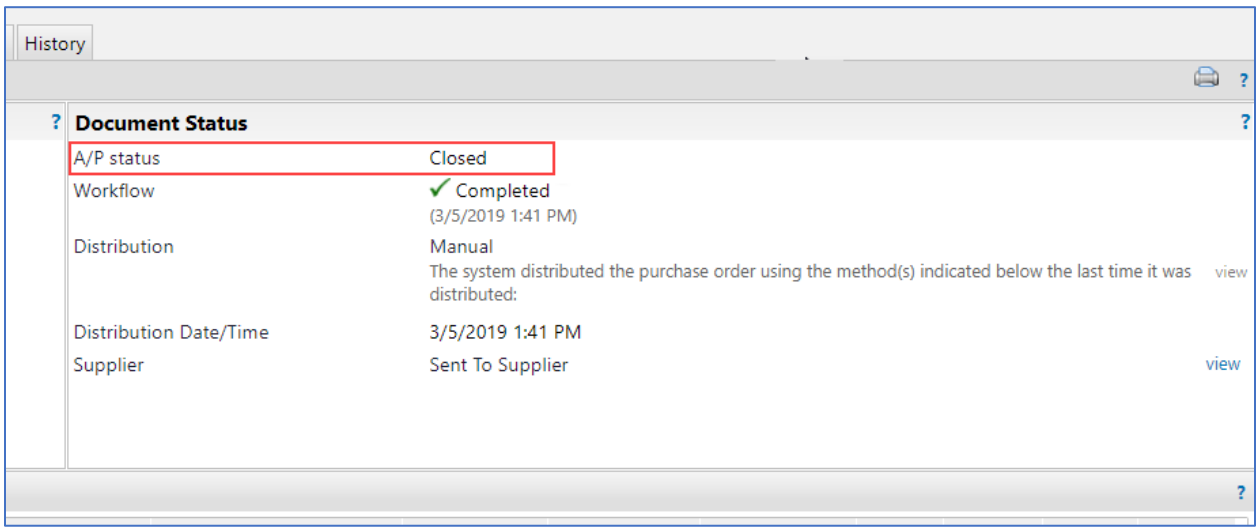
Closing Purchase Orders

Auto-close Purchase Orders

Fully invoiced purchased orders are automatically closed by the PantherExpress System. Once an invoice or invoices have been received that result in a fully invoiced Purchase Order line status, the system will automatically close the Purchase Order. This process will take effect for all new Purchase Orders created in the System.

Status Designation: Closed

When the System automatically closes the Purchase Order, the “A/P status” will show as “Closed.”



System Change Information

Automatically closing Purchase Orders will eliminate the possibility of a supplier over-invoicing a Purchase Order that has been fully invoiced and paid. This will ensure the Purchase Order and invoice information matches what is in the Oracle PRISM system. It is Oracle’s practice to automatically close a Purchase Order that has been invoiced in full.

Fully Invoiced

Fully invoiced, in the PantherExpress System, refers to the quantity invoiced matching the quantity purchased. The cost of the item or total amount of the Purchase Order is not factored into the System’s decision to close. If the Purchase Order has multiple line items, then the PantherExpress System will not automatically close the Purchase Order until all line items have been fully invoiced at the quantity of items expected for each line.

Examples and Scenarios

- ### Single Line-Item Purchase Order Invoiced at Correct or Lower Price: auto-close

You order one (1) box of latex gloves on a Purchase Order at a cost of $50.00. The invoice received is for one (1) box of latex gloves at a cost of $40.00. The full line-item quantity (one box) of the Purchase Order has been invoiced. The PantherExpress System will consider this order fully invoiced and automatically close the Purchase Order.

- ### Purchase Orders with Price Discrepancies: does not auto-close

A Purchase Order will not be automatically closed if it has an invoice discrepancy. Example: You order one (1) box of latex gloves on a Purchase Order at a cost of $50.00. The invoice received is for one (1) box of latex gloves at a cost of $70.00. The full line-item quantity (one box) of the Purchase Order has been filled; however, the invoiced cost is greater than the Purchase Order. The system will not auto-close the Purchase Order until the price discrepancy is resolved.

- ### Line-Item Substitutions: price dependent
    - Price Matches

You order three (3) blue sharpies but accept a substitution for green-colored sharpies. You are invoiced for three (3) green sharpies at the same price. The quantities match so the PantherExpress System considers this Purchase Order fully invoiced and closes the Purchase Order.

    - Price Does Not Match

You order three (3) blue sharpies but accept a substitution for green-colored sharpies. You are invoiced for three (3) green sharpies at a different price. Even though the quantities are the same, because both the price and the description do not match, the PantherExpress System cannot match the invoice line item to the Purchase Order line item and will not automatically close the Purchase Order.

- ### Multiple Line Item POs: quantity dependent

All line items on a Purchase Order must be fully invoiced for the Purchase Order to be automatically closed by PantherExpress**.** Example: You order one (1) box of latex gloves and two (2) boxes of black pens. The invoice comes through for two (2) boxes of black pens at the correct Purchase Order price. The Purchase Order will not close because there is an outstanding line-item quantity (one box of latex gloves).

A second invoice for the one (1) box of latex gloves is received. The PantherExpress System now considers this Purchase Order fully invoiced and automatically closes the Purchase Order. The same would be true if the initial invoice was for one box of latex gloves and one box of pens; the entire quantity of items for each line item must be invoiced for the System to auto-close the Purchase Order.

Manual close

If for some reason a Purchase Order is not fully invoiced or a line item on a Purchase Order is not fully invoiced, the originator of the transaction can perform a manual closure - commitment relief - in the PantherExpress system.

This is usually done to relieve Commitments. Commitments against accounts will remain until the Purchase Order is closed or cancelled.

Manually closing a punch-out order (choosing close Purchase Order from the menu, and then choosing finalize revision) will send a message to Oracle to relieve any remaining commitment on a Purchase Order.

Manual Closure cannot be undone.

You must be sure you are not expecting any additional invoices against the Purchase Order or any credit memos before manually closing the Purchase Order.

Cancelling a Purchase Order / Line

Sending a cancellation to Oracle will relieve the remaining commitment for an entire Purchase Order or a Purchase Order line and this cannot be undone. Make sure you do not want the items, are not keeping them, or an invoice or credit will not be received for them before making the decision to cancel a line.

Make sure you have cancelled the Purchase Order with the supplier, wait at least 2 months to ensure the item is not being delivered and invoiced.

Cancelling cannot be “un-cancelled.”

A cancelled line item has the commitment fully relieved on the PRISM side. This cannot be undone, and the purchaser must always be careful that they are ready to cancel the Purchase Order or the line items before making this request.

Purchase Orders over $10,000 – Competitive Bidding

Competitive bidding is required for a planned purchase of goods or services over $10,000. University policy FN 05 outlines the competitive bidding requirements. Competitive bids and price quotations can be obtained through a Request for Quotation (RFQ) or Request for Proposal (RFP). It is important to note that competitive bidding is not required when using University-wide Contracted Suppliers.

Competitive bidding is advantageous for several reasons. It ensures fairness to all bidders and that your pricing will be competitive within the marketplace. If a supplier is in a competitive situation, it is more likely to provide its most aggressive pricing and other terms. Bidding also ensures that you're complying with University policy and other applicable federal and state regulations for grants and contracts.

In accordance with University policy FN 05, University departments may conduct their own competitive bidding for purchases between $10,000 and $50,000. Departments may utilize the Request for Quotation document to obtain quotes. Your assigned procurement specialist can provide advice and guidance on the process.

If your department needs to utilize competitive bidding for an order of $10,000 or greater, contact the assigned Procurement Specialist or submit a web inquiry through Customer Service for assistance.

Directed or Sole Source Justification

University policy FN 05 requires competitive bidding for all purchases of goods or services greater than $10,000 with the exception of directed or sole source purchases. University policy FN 08 governs the use of directed or sole source purchases.

University purchasers must use the Directed or Sole Source Justification form to request an exception to competitive bidding by stating the reasons a particular supplier is a directed or sole source.

Only deans, department directors and department chairs ("3Ds") may sign as the approver on the Directed or Sole Source Justification Form.

While many people at the University consider the Directed or Sole Source Justification Form to be just another “purchasing form”, it is rather a document that is confirming the fact that the requester does not have any personal financial conflicts with the requested supplier. Only deans, department directors or department chairs would have this information and may sign as approvers on the Directed or Sole Source Justification form as they are the only individuals who will know the personal financial conflicts of faculty and staff and thus it is not an administrative duty and cannot be delegated. Thus, associate deans, assistant chairs and others with similar titles may not sign as the approver on the Directed or Sole Source Justification Form.

Also, only those directors who are the highest-ranking individuals in their departments are considered “department directors,” for example, the Director of the Payroll Department or the Executive Director of the DLAR. Thus an “administrative director” or “finance director,” for example, may not sign as a department director.

The approver must sign affirmatively recognizing and acknowledging

- the financial conflict (and how it is being managed) or lack of in his or her area of responsibility and
- that University business is being directed to a particular company.

These items are important as conflicts of interest and competitive bidding are serious concerns for both the University and federal agencies.

Purchasing Goods or Services with Federal Grant Funding

When purchasing goods or services with grant funds, the purchase is subject to the Federal Uniform Guidance (UG) and University purchasing procedures. It is important to note that the UG only applies to federal grants (financial assistance) and not federal contracts.

The UG procurement standards identifies three thresholds:

- Micro-Purchase: $10,000 or less
- Small Purchase: $10,000.01 - $250,000
- Competitive Proposal: $250,000.01 or more

Read more about Purchasing Goods or Services with Federal Grant Funding here.

More Information

You can find more information about the PantherExpress System and the applicable policies on the Purchase, Pay & Travel Website.

Alternatively, you can contact Purchase, Pay & Travel Customer Service for assistance.