

# Approver Quick Reference Guide

## Accessing PantherExpress

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

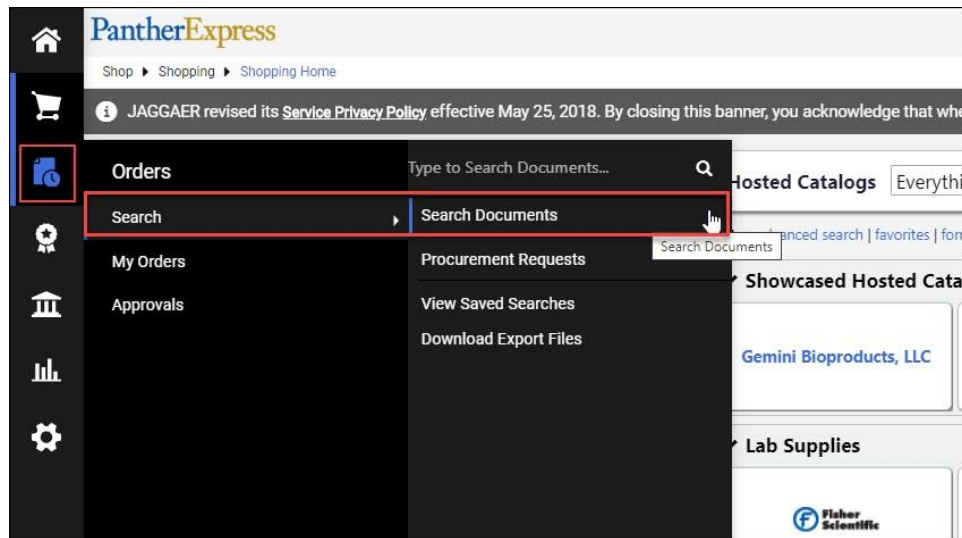
## PantherExpress Approvals:

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

## Review Order History by Department

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

1. Access [Orders – Search Documents](#)



2. Select a search option to search for the order by choosing from the dropdown menu (All documents, Requisitions, Purchase Orders, Invoices)
3. Optionally, enter the Purchase order number.
4. Select a date range from the dropdown menu, if appropriate.
5. Click **Go**.
6. View your search results

Use the [Advanced Search](#) option for more detailed search functionalities, e.g., Owner, Total Amount, Supplier, Catalog #, Account No., etc.

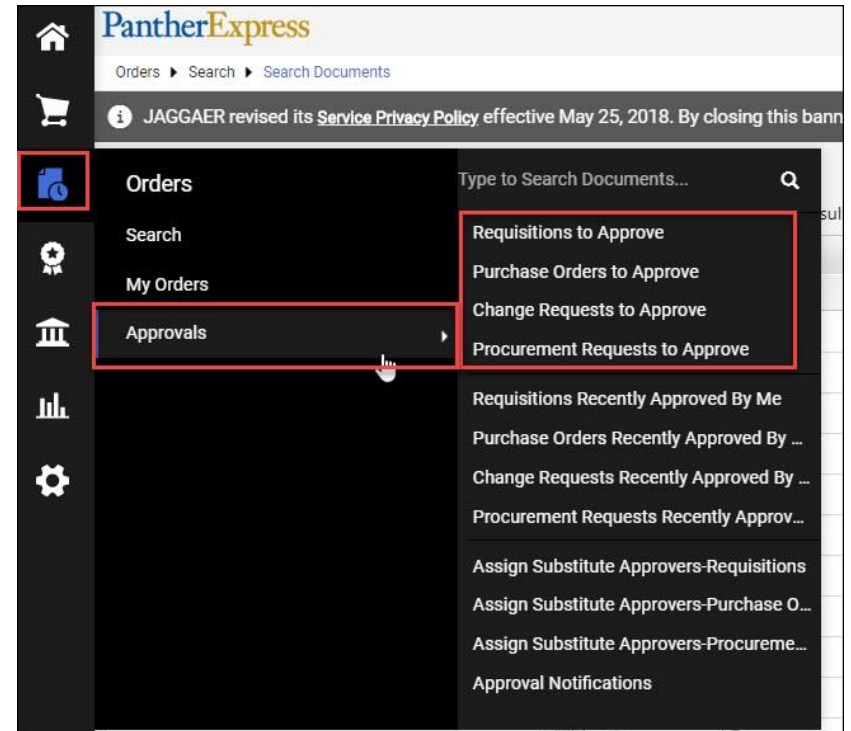
## Search Across all Document Types

7. Access [Orders – Search Documents](#)
8. Choose [All Documents](#) as the search option.
9. Enter search criteria such as requisition, purchase order, or invoice number, supplier or cart name, etc., and click **Go**.
10. View your search results.

## Assigning Orders to Yourself

**Note: to take action on an order you must first assign the order to yourself.**

1. Go to [Orders – Approvals menu](#).
2. Select [Requisitions, Purchase Orders, Change Requests or Procurement Requests to Approve](#).



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

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PR Date/Time	Requisitioner	Amount	Action
11/10/2018 1:37 AM	Robert Hester Jr.	14,777.09 USD	Assign



Folders 362 Days in folder [Department: 02070 (Purchasing Services): (0.00 - 500.00) USD]

- The requisitions will automatically move to the **My PR Approvals** folder. Click on the folder name to view the requisitions.

## Modify an Order

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

## Approve an Order

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

## Reject an Order or a Line Item in an Order

**Note: Rejected orders cannot be modified. If you would like the buyer to modify the order (account number, quantities, etc.), and resubmit the order for approval, then use the [Return to Requisitioner](#) option.**

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

## Forward an Approval

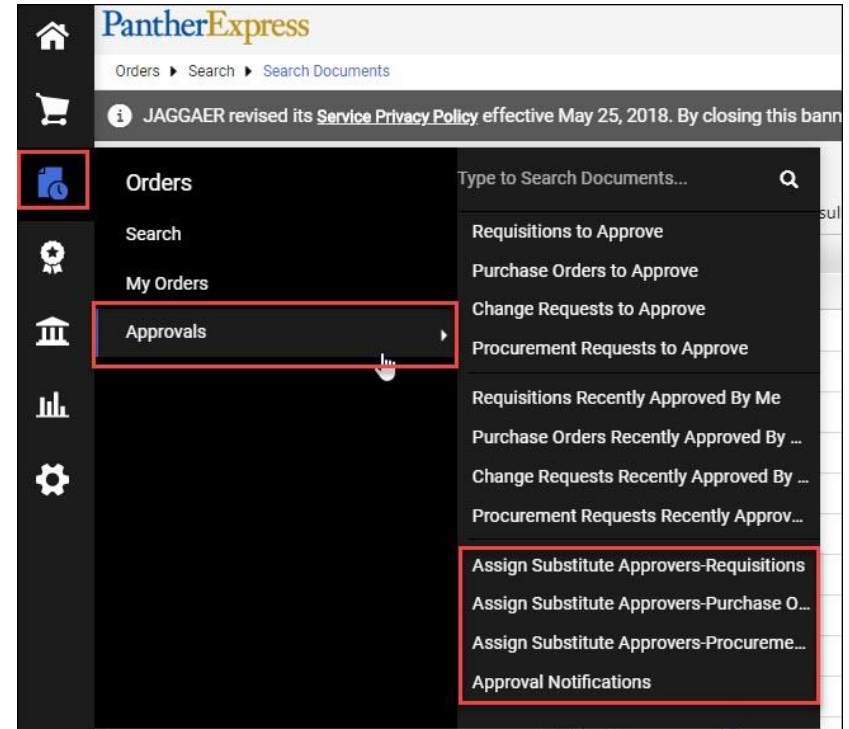
This function is provided so that a requisition can be forwarded to a different approver for review, if needed.

- From the **My PR Approvals folder**, or once the requisition is open for review, select **Forward To** from the dropdown menu, and click **Go**.
- Enter the last name of the person to forward to and click **Search**.
- Select the correct user.
- Enter a note for the selected approver.
- Click **Forward** to send the requisition(s).

## Assign a Substitute Approver

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

- Navigate to **Orders – Approvals**, then select the document type.



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

## To Get Help

Contact PantherExpress Customer Service at 412-624-3578