Approving Orders in PantherBuy

Chapter 4
Approving Orders in PantherBuy

Section Objectives

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

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

Approval Levels

Department Buyers

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

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

Approvers

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

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

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

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

OK-to-Pay

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

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

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

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

**IMPORTANT NOTES:**

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

Navigating to and Reviewing Requisitions

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

1. Logout as the Department Buyer.

2. Log back in as the designated Approver.
   - app#
   - password


PantherBuy
N → Home/Shop → Action Items
**Approving Orders in PantherBuy – Assign/Approve**

Note: Clicking on the **Approvals** tab in the main navigation bar is another way to access requisitions awaiting approval.

Note: The “*My Orders*” and “*Approvals*” will always be viewable in the Review area.

4. Under the Action Items, approvers can select either assigned or unassigned requisitions and/or purchase orders to view and approve.

![Diagram of Action Items]

- **My Orders**
  - Requisitions - Pending (1)

- **Approvals**
  - **My Assigned Approvals**
    - Requisitions (1)
  - **Unassigned Approvals**
    - Requisitions (10)
**Approving Orders in PantherBuy – Assign/Approve**

- To view more details about the requisitions pending approval (i.e. cart name, vendor, number of line items) click on the [Show requisition details](#) link at the top of the Approvals Tab.

- Any orders waiting to be approved will appear in the lower portion of the page and will be divided into folders based on the approval level. The approver in the above screen shot has level two (2500.01 - 5000) and level three (over 5000.01) approval limits.

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

5. Locate the requisition to be approved.
   - Video equipment from VWR @ $2100.68
   - You can also locate your requisition via the requisitioner name

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

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

8. Click Go. The order has been approved.

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

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

1. Navigate to the Approvals tab in the menu.

PantherBuy
N → Home/Shop → Approvals

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

3. Click on Assign.

   • The Requisition will automatically move to at the top of the screen.

4. Select View.
   • The Requisition will open and all fields will now be editable.

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

6. Click on Save.

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

   Available Actions: Approve/Complete Step

8. Click on Go to complete the approval process.
   • Once an order is approved and completed, the system automatically returns to the approvals page.
Reject the order for the overhead projector and motorized screens.

1. Navigate to the Approvals page
2. Locate the order that is over $5000.
3. Assign the order.
4. Click on View.
5. Scroll to the line items.
6. Select each item to reject by clicking on the box at the end of the line.

- In order to reject an entire multi-line order, you must select each line in the order and reject it.
- **A rejected order cannot be modified.** Once an order is rejected, if it needs modified, you must copy the original order to a new cart.
- This can be done by selecting the items still wanted and selecting **Add to Active Cart** from the drop down menu in the Supplier/Line Item Details section.
Approving Orders in PantherBuy – Reject

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

8. Select Reject Selected Items from the drop down menu.

   • For selected line items Reject Selected Items Go

9. Click on Go.

10. After clicking on Go, a new window will pop up.

11. In the text field enter the reason for rejecting the order. Then click on the Reject Line Item button.

   • When items are rejected, they remain in the order with a Pending, but line item(s) Rejected icon in front of the item description.

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

13. Select Approve/Complete Step.

14. Click on Go. The rejected order is complete.

15. When an order is rejected, the department buyer or shopper will receive an email notification. An example of this notification follows on the next page.
Approving Orders in PantherBuy – Reject

Subject: All Line Item(s) have been Rejected for Requisition# 2245062

-----Original Message-----
From: PantherBuy@bc.pitt.edu [mailto:PantherBuy@bc.pitt.edu]
Sent: Thursday, July 24, 2008 3:46 PM
To: dummydb@gmail.com
Subject: All Line Items have been Rejected for Requisition# 2245062

Re: LINE ITEM(S) REJECTED FOR REQUISITION# 2245062

Dear Department Buyer55,

The requisition listed above has been rejected.

This may have occurred for one of two reasons:

1. The Account Number assigned to the order is invalid and not currently Active.
2. Your Approver has rejected all line items in this requisition.

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

Please remember that in order for an account number to be active in the PantherBuy system, the entire 32-digit account number must first be activated in PRISM. This includes any change that may be made to the account number, including a new subcode or reference number.

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

https://solutions.sciserv.com/apps/Router/ReadSummary?
readReq=2245062&authUser=6655478&NavLevel1=Nav__OrdersHistory&NavLevel2=Nav__OrderHistoryMyRequisitions&timestamp=121692874503

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

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

Thank You,
The University of Pittsburgh
Approving Orders in PantherBuy – Return Order to Requisitioner

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

1. Navigate to the Approvals page
2. Locate the order.
3. Assign the order.
4. Click on View.
5. Review the order.
6. Notice that the wrong account number was used and needs corrected.
7. Scroll to the top of the page and to the “Available Actions” drop down menu.
8. Select Return to Requisitioner.
9. Click on the Go button.
Approving Orders in PantherBuy – Return Order to Requisitioner

10. A pop-up window will appear to asking to list the reason that the order is being returned.

11. The requisitioner will then receive an email notifying them that their order has been returned.

12. The returned requisition will appear under the users Action Items section.
13. Once the user has pulled the returned requisition up, there are multiple ways that the individual can check to see why the requisition was returned:

- Through the Comments tab

- Through the History tab

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

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

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

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

1. Navigate to the Approvals page.
   
   PantherBuy
   N → Home/Shop → Approvals

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

3. Select Forward from the drop down menu.

4. Click on the Go button.
   
   A new window will pop up.

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

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

6. Click on Search.
   - Select the correct user by clicking the radio button next to their name.
   - Click on the button.
Approving Orders in PantherBuy – Forwarding PR(s)

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

8. Enter a note for the selected approver.

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

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

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

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

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

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

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

1. Navigate to the Approvals Page

   PantherBuy
   N → Home/Shop → Approvals

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

3. Click on the Assign Substitute link.
   - This link is located on the upper left-hand side of the folder title.

4. Enter in the last name of the user who will be assigned as the substitute.

5. Click on Search.

6. Select the correct user if more than one user appears.
Approving Orders in PantherBuy – Assigning a Substitute

7. Click on the Choose Selected User button.

8. The Substitute’s name will appear above the Folder Name.

9. To end a Substitute’s assignment, click on the End Substitution link next to their name.
Approving Orders in PantherBuy – Checking the Status

Check the status of the orders as a Department Buyer.

1. Logout as the Approver.
2. Log in as the Department Buyer again
3. Go to the History tab.
4. Click on My Requisitions.
   - Look over the status of your requisitions.
   - Take note of the icons under Status.

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

<table>
<thead>
<tr>
<th>Status Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>Requisition Approved</td>
</tr>
<tr>
<td>☑️</td>
<td>Requisition Pending Approval</td>
</tr>
<tr>
<td>✗</td>
<td>Requisition Rejected</td>
</tr>
<tr>
<td>←</td>
<td>Requisition Withdrawn</td>
</tr>
<tr>
<td>☑️</td>
<td>Pending, but line item(s) Rejected</td>
</tr>
<tr>
<td>✔️</td>
<td>Approved, but line item(s) Rejected</td>
</tr>
</tbody>
</table>

   - What are the differences between this view and the requisitions view?
   - Has the Workflow Status been completed?

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

<table>
<thead>
<tr>
<th>Status Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>!</td>
<td>Status Requires Attention</td>
</tr>
<tr>
<td>✔️</td>
<td>Approved Purchase Order</td>
</tr>
<tr>
<td>☑️</td>
<td>Purchase Order Pending Approval</td>
</tr>
<tr>
<td>✗</td>
<td>Rejected Purchase Order</td>
</tr>
<tr>
<td>☑️</td>
<td>Pending, but line item(s) Rejected</td>
</tr>
<tr>
<td>✔️</td>
<td>Approved, but line item(s) Rejected</td>
</tr>
</tbody>
</table>

Note: Be aware that you will not be able to View/Check the status of a requisition that you did not place yourself. If you are an Account Assigner, you will not be able to access the requisition submitted by a shopper to get the PO number. If you are an Approver, you will not be able to get the PO number from an order you may have approved. Only the person who placed the order will be able to see this information.
Approving Orders in PantherBuy – Checking the Status

View a note on a rejected order:

1. Click on the History tab or the Comments tab

2. Click on My Requisitions

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

4. Once the requisition is opened up, click on the History tab.

5. Notice in this example the line items were rejected by the approver because the items were no longer needed.