



# Approver User Guide

## Accessing the System

1. Open your web browser and go to <https://solutions.sciquest.com/org/pittsburgh>
2. Enter your Username and Password. Click "GO"

## PantherBuy Approval Levels

There are 3 Approval Levels in PantherBuy:

\$0-\$500.00; >\$500-\$5,000; >\$5,000

- Each department must have at least one person at each approval level.
- An Approver can be listed at one, two, or all three approval levels.
- All orders over \$5,000 will go to Purchasing Services after departmental approval.
- Every department must have at least one department buyer or approver to serve as the OK-to-Pay Approver.
- Approvers are notified via email when a document has been routed for their approval. The email contains a link that takes the recipient directly into the appropriate area.

## Approval Navigation

N → Home → Action Items

- *My PR Approvals* and *My PO Approvals* will always be viewable in the *Review* section.
- The only time that a departmental folder will appear is when there is an order from a department buyer waiting to be approved.



## Assign/Approve an Order

1. Click on the folder icon to view requisitions in that folder or click on **Approvals** in the menu bar.
2. Click on *View* to view the contents of the order.

3. Scroll to the top of the page and select **Approve/complete step** from the *Available Actions* drop down menu.

4. Click **Go**.

## Modify an Order

**NOTE:** To modify an order you must first assign it to yourself.

1. Locate the order to be approved.
2. Click on *Assign* (found in the *Action* field).
3. The requisition will automatically move to **- My PR Approvals** at the top of the screen.
4. Select *View*.  
Or
5. Locate the order to be approved, and click on *View*.
6. From the *Available Actions* drop-down menu at the top of the screen select *Assign to Myself*. Click *Go*.
7. Edit the order (such as Ship-to location, Quantity, Account Number, etc.)
8. Save your changes.
9. Scroll to the top of the screen.
10. Select **Approve/Complete Step** from the *Available Actions* drop-down menu.
11. Click **Go**.

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

**NOTE:** To reject an order you must first assign it to yourself.

1. Locate the order to be rejected.
2. Click on *Assign* (found in the *Action* field).
3. The requisition will automatically move to **- My PR Approvals** at the top of the screen.
4. Select *View*.  
Or
5. Locate the order to be approved, and click on *View*
6. From the *Available Actions* drop-down menu at the top of the screen select *Assign to Myself*. Click *Go*.

## Reject an Order or Line Item (Cont'd)

7. 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 from the list and reject it.


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8. Scroll to the top of the *Supplier /Line Item Details* area.
9. Select **Reject Selected Items** from the drop down menu. Click **Go**.
10. In the pop-up window, enter a reason for rejecting the order.
11. Click on the **Reject Line Item** button.
12. Scroll up to the *Available Actions* drop down menu.
13. Select *Approve/Complete Step*.
14. Click on **Go**.

Note: You cannot reject individual lines items on a Tap-out order. All lines must be rejected and a new order be created for the "good" line items.

## Review Order History by Department

Departmental approvers are able to not only see the history of orders they placed, but all others in the department assigned to them.

1. Reference the **Review** section on the Home page.
2. Click the *Order History* link to access the PO History screen
  -  **History**
3. Select a method to search for the order by clicking the appropriate tab, e.g., by PO No., by Requisition, by Supplier/SKU.
4. Click the *Filter* checkbox to activate the filter options at the bottom of the search page.
5. Click the radio button next to Department Orders.
6. Enter a specific date range, if appropriate.
7. Click the **Search** button, once you have the desired filters set.
8. View your search results.

## OK-to-Pay

- Any order over \$5,000 will not be paid until designated as "OK-to-Pay".
- Every department must have at least one designated OK-to-Pay Approver. This person can be a department buyer or approver.
- Any order over \$5,000, once approved and sent to the supplier, will automatically go to the OK-to-Pay folder. An email will be sent to the designated OK-to-Pay Approver.
- When the product arrives on campus, the person who receives the order should inform the designated OK-to-Pay Approver.
- The designated approver will locate the order in the OK-to-Pay folder, assign the order to himself, and select *Approve/Complete* from the drop down menu of available actions.

## Assign a Substitute Approver

In the event an approver is absent or does not have access to the application, he can designate another approver as his substitute.

- The substitute is able to review documents routed to the original approver.
  - Substitutes are assigned at the folder level from the Approvals screen.
1. Access the **Approvals** section of the application.
  2. Determine for which folder(s) you would like to set up a substitute approver.
  3. Select the *Assign Substitute* link (found above each folder)
  4. Enter specific criteria to find the recipient of the forwarded requisition (First name, Last name, email, etc.)
  5. Click the **Search** button
  6. Select the appropriate user using the radio button to the left of the user's name.
  7. Click on **Choose Selected User** to assign that individual as the substitute.
  8. Click *End Substitution* to remove the substitution setting for that folder.

## Forward Purchase Requisitions

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

1. Access the **Approvals** section of the application.
2. Select the orders that are to be forwarded to another approver.
3. Select *Forward* from the drop down menu; Click **Go**.
4. Enter the last name of the person to forward to; Click **Search**.
5. Select the correct user; Click on **Choose Selected User**.
6. Enter a note for the selected approver.
7. Click on **Forward** to send the requisitions.

## Invoice Discrepancies

1. If there is an invoice discrepancy with your order, or the order that one of your Department Buyers has placed, you will first be contacted by Payment Processing via email.
2. Within the email there will be a comment from Payment Processing and also a link that will take you to the PantherBuy system.
3. Click on the link and review the order and the invoice. Be sure to check the **Matching** tab.
4. Once you review and approve, please go to the **Comments** tab and click on "Reply To" next to the name of the individual who contacted you from Payment Processing. Enter in your comment and send it to Payment Processing.

## To Get Help

Contact PantherBuy via email at: [PantherBuy@bc.pitt.edu](mailto:PantherBuy@bc.pitt.edu)