

Department Approvals Explanation

Approvals:

Approvals are required in the PantherExpress System if a department buyer spends over his/her assigned spending limit. The PantherExpress System allows one of three different spending limits for department buyers: \$0, \$500, and \$5000. If the department buyer has a \$0 spending limit, every order placed places will require approval. If the department buyer has a \$500 spending limit, he/she can place orders up to and including \$500 without approval; however, if that department buyer places an order that is \$500.01 or higher, the order will require approval. If the department buyer has a \$5000 spending level, he/she may place orders up to and including \$5000 without approval; however, any order \$5000.01 or greater will require approval.

Approvals for goods purchases in the PantherExpress System will occur at a department level. The department approval workflow is triggered by the five-digit department code that is used in the accounting code placed on the order. 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. **This excludes Specialty Forms. Specialty Forms orders have different approvers and follow a different approval workflow.** Specialty Forms instructions are located here: <http://cfo.pitt.edu/pExpress/SpecialtyFormsTraining.php>.

- An approver at the \$0-\$500 level will see ALL orders between \$0 and \$500 that require approval. For example, if a department buyer who has a \$0 spending limit places an order for \$350, the order will go to the approvers who are listed in the \$0-\$500 range. Once an approver at this level has approved it, the order will go to the supplier.
- An approver at the \$500.01-\$5000 level will see ALL orders between \$500.01 and \$5000 that require approval. For example, if a department buyer who has either a \$0 or \$500 spending limit, places an order for \$1000, the order will go to the approvers who are listed in the \$500.01-\$5000 range, passing over the \$0-\$500 level. Once an approver at this level has it, the order will go to the supplier.
- An approver at the \$5000.01 and above level will see ALL orders greater than \$5000.01. For example, if any department buyer, regardless of his/her spending limit, places an order for \$10000, it will go to the approvers who are listed in the \$5000.01 and above range, passing over both the \$0-\$500 and \$500.01-\$5000 levels. Once an approver at this level has approved it, the order will go to the Purchasing Services Department for further approval.

Important Notes:

- Each department **MUST** have at least one person at each approval level. We recommend having two or more.
- An approver can be listed at one, two, or all three levels of approval. For example, if Andrew Approver wants to be able to approve all orders in his department, he can be placed at all three levels.
- Each approval level can have multiple people listed. For example, if the Strategic Sourcing Department wants to have three people listed at the \$0-\$500 level, two at the \$500.01-\$5000 level, and one at the \$5000.01 and above level, this is permitted.
- If multiple approvers are listed at any level, then any transaction that requires approval and falls within the level will be placed into a shared folder. For example, if a department buyer with a \$0 spending limit in the Strategic Sourcing Department places an order for \$350, this order will go into a shared folder for approval. If the Strategic Sourcing Department has three approvers at the \$0-\$500 level, any of the three approvers will have access to the folder and will be able to approve the order. ***The order will only require the approval of one of the three approvers.***
- You can use one Department Approval Form to assign the same approvers to multiple department codes. PantherExpress System Solutions does not need separate forms for each individual department code.
- All orders over \$5000 will go to the Purchasing Services Department after department approval.
- Appropriate Supervisor and RC signatures are required for this form. If you do not know who the RC is for your area, please refer to this list: <http://www.cfo.pitt.edu/pexpress/documents/RCApproverList.pdf>.

When this form is completed, please either fax it to the PantherExpress System team at 412-624-5278, email it us at pantherbuy@cfo.pitt.edu, or mail it to us at 3309 Cathedral of Learning. If you have any questions regarding this form, please contact customer service <http://cfo.pitt.edu/pexpress/Customerservice/index.php> or check the website - <http://cfo.pitt.edu/pexpress/pbuytraining.php>.

Department Approval Form

Please choose one: New Department in the PantherExpress System Update Existing Department

Department Name: _____ **Five-digit Department Code(s):** _____

YOU MUST LIST AT LEAST ONE PERSON AT EACH OF THE FOLLOWING LEVELS:

Account assigner(s) for Orders: *An account assigner will be the person(s) who assigns an account number to an order submitted by a shopper.*

	<i>Add</i>	<i>Remove</i>		<i>Add</i>	<i>Remove</i>
<input type="checkbox"/>					
	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Approver(s) for orders between \$0 - \$500: *An approver at this level can only approve orders between \$0 up to and including \$500.*

	<i>Add</i>	<i>Remove</i>		<i>Add</i>	<i>Remove</i>
<input type="checkbox"/>					
	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Approver(s) for orders between \$500.01 - \$5000: *An approver at this level can only approve orders between \$500.01 up to and including \$5000.*

	<i>Add</i>	<i>Remove</i>		<i>Add</i>	<i>Remove</i>
<input type="checkbox"/>					
	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Approver(s) for orders between \$5000.01 and above: *An approver at this level can only approve orders between \$5000.01 and above.*

	<i>Add</i>	<i>Remove</i>		<i>Add</i>	<i>Remove</i>
<input type="checkbox"/>					
	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Attach a separate sheet for additional approvers if necessary.

Supervisor's Printed Name: _____

Supervisor's Signature: _____

Date: _____ **Phone:** _____

Authorized RC's Printed Name: _____

Authorized RC's Signature: _____

Date: _____ **Phone:** _____