

PANTHEREXPRESS

BUYING  
&  
PAYING



PantherExpress Change Order and  
Commitment Relief Training  
June 2019

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# Process and Procedure Changes for the PantherExpress System

The PantherExpress Systems Solutions team is participating in and supporting an Office of the Chief Financial Officer initiative to improve budgeting controls and purchasing procedures. To support this effort, we are updating several forms and processing procedures to enhance the data integrity between the PantherExpress and Oracle (PRISM) systems.

The following procedures will take effect starting July 1, 2019.

## Account code updates for a purchase order

Once an invoice is received and charged to the Purchase Order (PO), it will be classified as fully or partially invoiced. At this point, the account code cannot be changed on the PO and all changes must be made using a journal entry to transfer charges to a different account code. *Please double check your account codes before submitting your Purchase Order.*

## Multi-year Specialty Forms

Account code changes are permitted on multi-year service agreements, research sub-contracts, and supplier provided agreements even if invoices have been received against the transaction. These types of transactions can last multiple years, and account code updates may need to be made to accommodate budget- and project-related changes.

## Blanket Order Timeframe

Blanket/standing orders should not extend past the end of the fiscal year (June 30). If an account code change request is received by Customer Service, the group will make the change if the request is received within the fiscal year and does not extend past June 30 of that year. A new blanket order should be created each year.

## Cancelling a Purchase Order Line

Once a purchase order line has been cancelled in PantherExpress the line cannot be **“un-cancelled”**. Because the PantherExpress System is now tied to the Oracle Budget Module, canceling a line relieves all remaining commitments for that line in Oracle. Once all of the commitments have been relieved on a purchase order line, Oracle cannot accept a request to have the line “un-cancelled”. **Make sure you do not need the item** before cancelling the line in PantherExpress.

## Declining an Update My PO form request

A new form will be introduced to PantherExpress to allow you to request a purchase order change. The new form is called Update My PO and will go in place July 1, 2019. A request placed on the Update My PO form may be declined for the following reasons:

- a. The requested change can be performed by the department buyer who placed the order.
- b. The requested change meets one of the processes or procedures outlined on this document.

# Updating a Purchase Order

Starting July 1, 2019 Purchase Orders will no longer have “edit” functionality and users will no longer be able to directly edit any fields on the Purchase Order. To update a price, quantity, or add a line to a PO, users will need to use the Create Change Request functionality. Certain other changes will be allowable on the [Update My PO form](#).

## Create Change Request Functionality

The Create Change Request should be completed for quantity and price changes, for adding a line item to a non-catalog order, using the add non-catalog item function, or for canceling a PO line. All other changes must be completed by using the Update My PO form (details below).

In order to use the create change request functionality, you must go to the PO 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.

## Price and/or Quantity Change

You can add to the quantity ordered:

- **Before Invoicing** – Use the Create Change Request feature to add to the quantity.
  - Please note, the Change Request update will not notify the Supplier. Once the Request is completed, contact the supplier to notify them of the change, generate a printout of the updated purchase order and then send this to the supplier (see below).
- **NOID Exception** After Invoicing:
  - You *cannot* add items to your PO once it has been invoiced. There is one exception to this rule that occurs only when a quantity update it is needed to correct a NOID. 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).

You can remove items from the quantity ordered:

- **Before Invoicing** – Use the Create Change Request feature to remove item from the quantity.
  - Please note, the Change Request update will not notify the Supplier. Once the Request is completed, contact the supplier to notify them of the change, generate a printout of the updated purchase order and then send this to the supplier (see below).
- **After Invoicing** – After you contact the supplier, 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 are able to 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.

You can modify the price of the orders:

- **Non-Catalog orders** – You may use the Create Change Request feature
- **Before Invoicing** – Use the Change request feature to modify the price.

- Please note, the Change Request update will not notify the Supplier. Once the Request is completed, contact the supplier to notify them of the change, generate a printout of the updated purchase order and then send this to the supplier (see below).
- **NOID Exception After Invoicing –**
  - You *cannot* modify the price after your order has been invoiced. There is one exception to this rule that occurs only when the price update it is needed to correct a NOID. 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 PO. Use Create Change Request to correct this (see below).

## Using Create Change Request to Update Price or Quantity

1. Open the PO that needs to be updated.

The screenshot displays the 'Status' tab of a purchase order. The 'General Information' section includes PO/Reference No. P00002618, Revision No. 0, Supplier B & B Microscopes LTD., Purchase Order Date 5/29/2019, and a Total of 250.00. The 'Document Status' section shows the A/P status as 'Completed' on 5/29/2019 at 11:16 AM. The 'Line Item Status' table lists two items: 'Microscope Part 1' (ABC123, 1 EA, 100.00 USD) and 'Microscope part 2' (ABC456, 1 EA, 150.00 USD). The 'Available Actions' menu is open, with 'Create Change Request' selected.

*Purchase Order from a Non-Catalog Form open to the Status tab.*

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

This close-up shows the 'Available Actions' menu with the following options: Add Comment, Add Comment, **Create Change Request**, Add Notes to History, Finalize Revision, Create Credit Memo, Create Invoice, Print Fax Version, and Close PO. The 'Go' button is located to the right of the menu.

- 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, and **select the line item** under Product Description to open the form.

Product Description		Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1	Microscope Part 1 <a href="#">more info...</a>	ABC123	EA	100.00	1 EA	100.00 USD	<a href="#">edit</a>
Taxable <span style="color: red;">✘</span> Capital Expense <span style="color: red;">✘</span> Commodity Code Scientific		Internal Note <i>no note</i> Internal Attachments <a href="#">Add Attachments</a> External Note <i>no note</i> Attachments for supplier <a href="#">Add Attachments</a> PO Clauses <i>no clause</i>					



- When the form opens, you can **update the Quantity and/or the Price.**

**Part B. Details**

Catalog No. ABC123

Product Description Microscope Part 1

Quantity

Packaging (UOM) EA - Each

Estimated Price

Contract

Health and Safety

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

- Scroll to the top of the page, **select Save** in the Available Actions, menu, then **select the Go button.**

Available Actions: Save

- Save
- Add and go to Cart
- Add to Cart
- Add to Draft Cart or Pending PR/PO
- Add to PO Revision
- Add to Favorites
- Add to new Cart

Go Close

- A notification will appear that the changes has been saved. **Close the Form.** The Change Request will have updated.

▼ Lines Selected Line Item Actions ▼

**B & B Microscopes LTD.** [more info...](#)

Contract *no value*  
PO Number P00002618

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 Microscope Part 1 <a href="#">more info...</a>	ABC123	EA	110.00	2 EA	220.00 USD	<input type="button" value="edit"/>

Taxable   
Capital Expense   
Commodity Code Scientific

Internal Note *no note*  
Internal Attachments

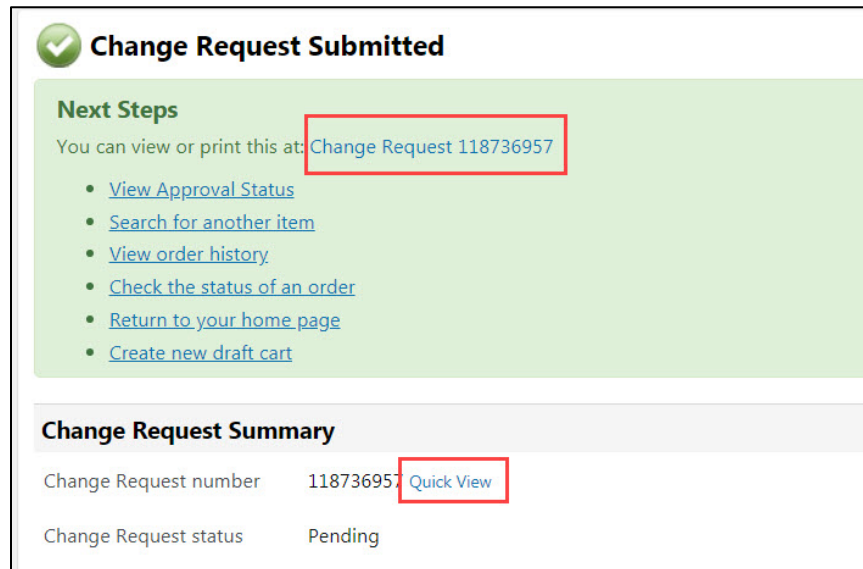
External Note *no note*  
Attachments for supplier

PO Clauses  
*no clause*

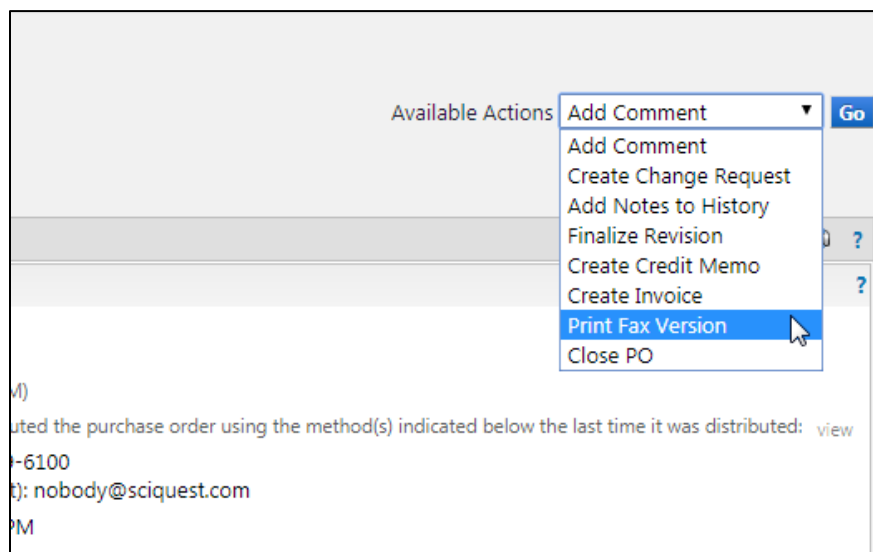
8. Scroll to the top of the page. You will see a message indicating that the change request is ready to be submitted. Select the Submit Request button to finish the system process.



9. 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.



10. 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 PO and send it to the supplier. To do this, open the PO, select "Print Fax Version" from the Available Actions drop-down, and then select the "Go" button.



## Using Create Change Request for Hosted Catalog and Punchout Item Quantity Updates

On punchout and hosted catalog orders, users may only use the Create Change Request functionality to update quantity. PantherExpress users are unable to change the pricing information on these types of orders.

1. Open the PO that needs to be updated.

The screenshot shows the PantherExpress interface for a purchase order. The top navigation bar includes 'Home', 'Shop', 'Documents', 'Contracts', 'Accounts Payable', and 'Reporting'. The main content area displays the purchase order details for 'PB253145 Revision 0' from 'Garcia Marketing Inc.'. The 'Available Actions' menu is open, showing options like 'Add Comment', 'Create Change Request', 'Add Notes to History', 'Finalize Revision', 'Create Credit Memo', 'Create Invoice', 'Print Fax Version', and 'Close PO'. The 'Create Change Request' option is highlighted. Below the actions, there is a 'Document Status' section showing 'Open' and 'Completed' (5/29/2019 12:46 PM). A table lists line items for 'Anti-Static Gloves' in Medium and Large sizes. The bottom right corner shows a 'Total' of 171.00 USD.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1 ✓ Anti-Static Gloves - Medium <a href="#">more info...</a>	KS-ASGM	EA	11.40	5 EA	57.00 USD	Sent To Supplier	none	none	No Matches
2 ✓ Anti-Static Gloves - Large <a href="#">more info...</a>	KS-ASGL	EA	11.40	10 EA	114.00 USD	Sent To Supplier	none	none	No Matches

Subtotal	171.00
Shipping	0.00
Handling	0.00
<b>Total</b>	<b>171.00 USD</b>

2. In the top right corner of the purchase order summary screen, select the drop-down for the Available Actions menu, and **select Create Change Request**, then **select the Go button**.

This close-up screenshot focuses on the 'Available Actions' dropdown menu. The menu is open, and the 'Create Change Request' option is highlighted in blue. A mouse cursor is pointing at the 'Go' button next to the dropdown. The background shows the 'Document Status' section with 'Open' and 'Completed' (5/29/2019 11:16 AM) status.

- 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.

**Create Change Request**

This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

Email notification(s):

- Department Buyer1 (Prepared by, Prepared for) <dummyspb@gmail.com>  
[add email recipient...](#)

User with change request permission:  
[add email recipient...](#)

1000 characters remaining

Attach file to this change request (optional):

Attachment Type:

File Name:

File:  No file chosen

- The Change Request Summary page will load. **Scroll down** to the Line items, and **select the edit button** for the line item.

Product Description		Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
<b>1 Anti-Static Gloves - Medium</b> <a href="#">more info...</a>		<b>KS-ASGM</b>	<b>EA</b>	<b>11.40</b>	<b>5 EA</b>	<b>57.00 USD</b>	<input type="button" value="edit"/>
Manufacturer Name	KINETRONICS	Taxable	✘	Internal Note	no note		
Manufacturer Part Number	KS-ASGM	Capital Expense	✘	Internal Attachments	<input type="button" value="Add Attachments"/>		
UNSPSC	46-18-21-00	Commodity Code	no value	External Note	no note		
<a href="#">more info...</a>				Attachments for supplier	<input type="button" value="Add Attachments"/>		
				PO Clauses	no clause		

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

**Edit Line** ? X

1 Anti-Static Gloves - Medium [more info...](#) KS-ASGM EA 11.40 10 EA 57.00 USD

Manufacturer Name KINETRONICS Taxable   
Manufacturer Part Number KS-ASGM Capital Expense   
UNSPSC 46-18-21-00 Commodity Code   
[more info...](#)

Internal Note   
1000 characters remaining [expand](#) | [clear](#)

External Note   
1000 characters remaining [expand](#) | [clear](#)

[Save](#) [Cancel](#)

6. When you return to the Purchase Order, the Quantity and Ext. Price will have updated.

Lines Selected Line Item Actions

**Garcia Marketing Inc.** [more info...](#) Contract *no value*  
PO Number PB253145

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Anti-Static Gloves - Medium <a href="#">more info...</a>	KS-ASGM	EA	11.40	10 EA	114.00 USD

edit

Manufacturer Name KINETRONICS Taxable **x**  
Manufacturer Part Number KS-ASGM Capital Expense **x**  
UNSPSC 46-18-21-00 Commodity Code *no value*

Internal Note *no note*  
Internal Attachments  
[Add Attachments](#)

External Note *no note*  
Attachments for supplier  
[Add Attachments](#)

PO Clauses *no clause*

7. 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.

This change request is ready to be submitted. [Submit Request](#) [Assign Draft](#)

8. 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.

The screenshot shows a confirmation page titled "Change Request Submitted" with a green checkmark icon. Below the title is a "Next Steps" section with a light green background. It contains the text "You can view or print this at: Change Request 118745777" where the request number is highlighted with a red box. Below this are several blue links: "View Approval Status", "Search for another item", "View order history", "Check the status of an order", "Return to your home page", and "Create new draft cart".

Below the "Next Steps" section is a "Change Request Summary" section with a light gray background. It contains a table with two rows:

Change Request number	118745777	<a href="#">Quick View</a>
Change Request status	Pending	

9. 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 PO and send it to the supplier. To do this, open the PO, select "Print Fax Version" from the Available Actions drop-down, and then select the "Go" button.

The screenshot shows a web interface with an "Available Actions" dropdown menu. The menu is open, displaying several options: "Add Comment", "Add Comment", "Create Change Request", "Add Notes to History", "Finalize Revision", "Create Credit Memo", "Create Invoice", "Print Fax Version", and "Close PO". The "Print Fax Version" option is highlighted with a blue background and a mouse cursor. To the right of the dropdown menu is a blue "Go" button. Below the dropdown menu, there is a text area with some partially visible text: "uted the purchase order using the method(s) indicated below the last time it was distributed: view", "-6100", "t): nobody@sciquest.com", and "PM".

## Add PO Line Item to Non-catalog Order

As a general rule, 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 one exception to this rule is to correct a Purchase Order for NOID resolution. If you need to correct a purchase order in this circumstance, you would use the Create Change Request feature to add the line item(s). An example would be, the supplier sends you more 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 under [Using Create Change Request to Update Price or Quantity](#).

### Using "Add non-catalog item" Functionality to Add New Line Item to Reconcile NOID

1. Open the PO that needs to be updated.

The screenshot shows a web application interface for a purchase order. The top navigation bar includes 'Home', 'Shop', 'Documents', 'Contracts', 'Accounts Payable', and 'Reporting'. The main content area displays the purchase order details for 'P00002618 Revision 1' from supplier 'B & B Microscopes LTD.'. The 'General Information' section includes fields for PO/Reference No., Revision No., Supplier Name, Purchase Order Date, Total, Owner Name, Owner Department, Owner Phone, Owner Email, and Requisition Number. The 'Document Status' section shows 'A/P status: Open', 'Workflow: Completed (5/29/2019 11:14 AM)', 'Distribution: The system distributed the purchase order using the method(s) indicated below the last time it was distributed.', 'Distribution Date/Time: 5/29/2019 11:16 AM', and 'Supplier: Sent To Supplier'. Below this is a 'Line Item Status' table with columns for Product Description, Catalog No, Size / Packaging, Unit Price, Quantity, Ext. Price, Supplier, Receiving, Invoicing, and Matching. Two line items are listed: 'Microscope Part 1' and 'Microscope part 2'. A summary table at the bottom shows Subtotal (370.00), Shipping (0.00), Handling (0.00), and Total (370.00 USD).

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

This close-up screenshot focuses on the 'Available Actions' menu in the top right corner of the purchase order document. The menu is open, showing a list of options: 'Add Comment', 'Create Change Request', 'Add Notes to History', 'Finalize Revision', 'Create Credit Memo', 'Create Invoice', 'Print Fax Version', and 'Close PO'. The 'Create Change Request' option is highlighted in blue. A red box highlights the entire menu area. To the right of the menu is a blue 'Go' button. Below the menu, the document status is visible: 'Open', 'Completed (5/29/2019 11:16 AM)', and a note: 'The system distributed the purchase order using the method(s) indicated below the last view'.

- 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. Underneath the supplier name, use the **Add non-catalog item for this supplier** link to open the Non-catalog Item functionality.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 Microscope Part 1 <a href="#">more info...</a>	ABC123	EA	110.00	2 EA	220.00 USD	<a href="#">edit</a>



5. Required fields are indicated with bold text. This includes these are 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.

**Add Non-Catalog Item** ? X

**B & B Microscopes LTD.**  
490 LOWRIES RUN RD, Pittsburgh, Pa 15237 US

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
Microscope Part 3	ABC789	1	50	EA

237 characters remaining expand | clear

Product Details

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

6. When you return to the Purchase Order, you will be able to review the changes.
7. 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.

This change request is ready to be submitted.

8. 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.

Change Request Summary	
Change Request number	118785532 <a href="#">Quick View</a>
Change Request status	Pending
Cart name	2019-05-29 dbt1 01 - CR - CR - CR - CR
Change Request date	5/30/2019
Change Request total	420.00 USD
Number of line items	3

9. 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 PO and send it to the supplier. To do this, open the PO, select "Print Fax Version" from the Available Actions drop-down, and then select the "Go" button.

Available Actions: Add Comment, Add Comment, Create Change Request, Add Notes to History, Finalize Revision, Create Credit Memo, Create Invoice, **Print Fax Version**, Close PO

uted the purchase order using the method(s) indicated below the last time it was distributed: view  
6100  
nobody@sciquest.com

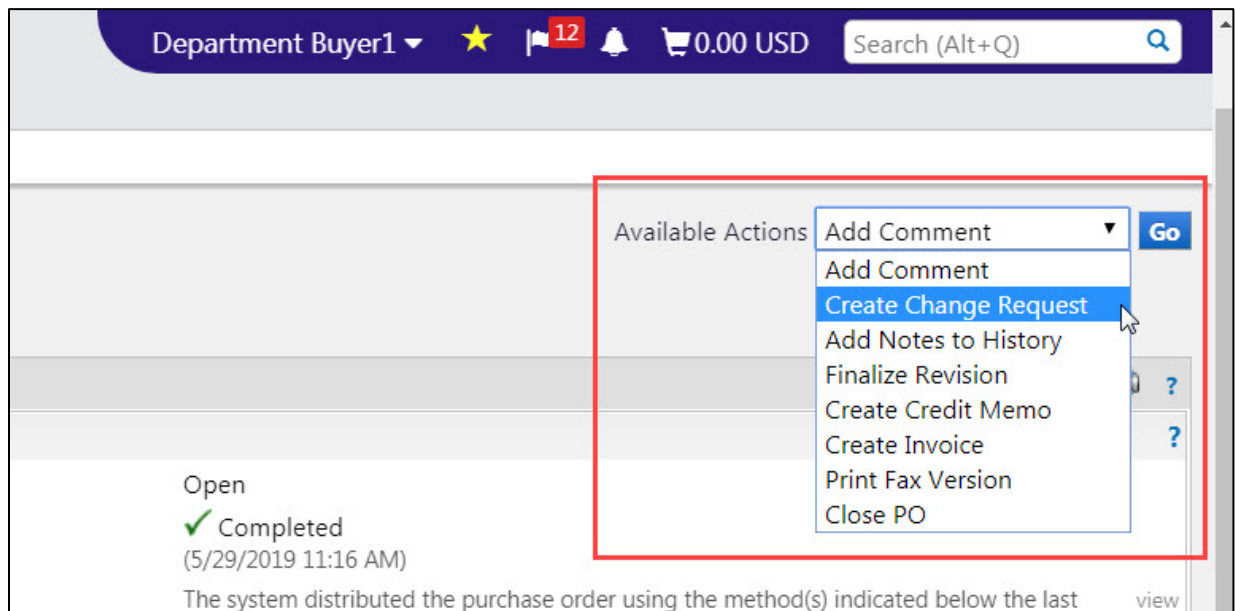
## Cancel a PO Line

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.

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



3. 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.

### Create Change Request

This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

Email notification(s):

- Department Buyer1 (Prepared by, Prepared for) <dummyspb@gmail.com>  
add email recipient...

User with change request permission:  
add email recipient...

1000 characters remaining

Attach file to this change request (optional):

Attachment Type: File

File Name:

File:  No file chosen

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

▼ Lines Hide Line Details Selected Line Item Action

**VWR International** more info...

Add non-catalog item for this supplier...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 Organic items <small>more info...</small>	30933	EA	12.00	1 EA	12.00 USD	<input checked="" type="checkbox"/> edit

Contract: no value

PO Number: SP0456

Quote number: no value

Taxable:

Capital Expense:

Commodity Code: Blank

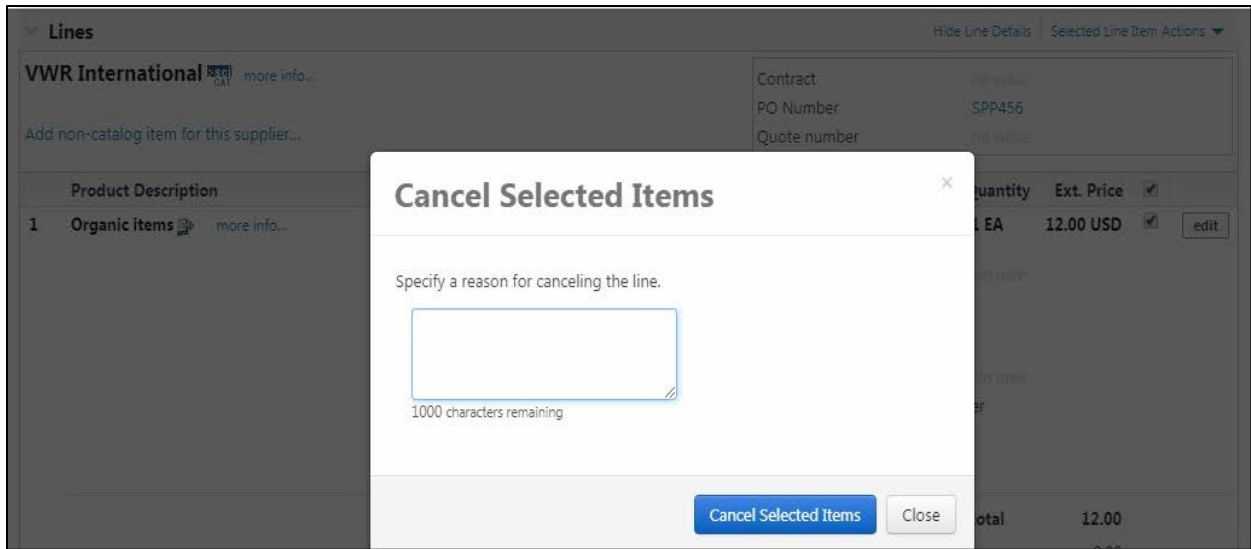
Internal Note: no note

Internal Attachments:

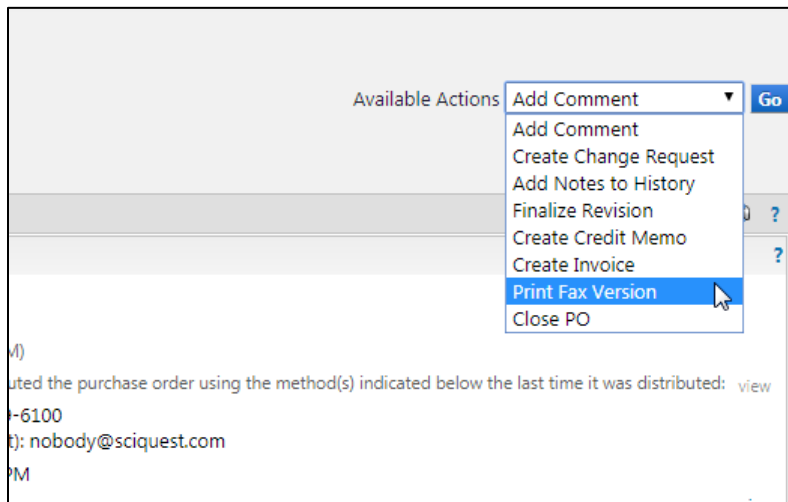
External Note: no note

Attachments for supplier:

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



- 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 PO and send it to the supplier. To do this, open the PO, select "Print Fax Version" from the Available Actions drop-down, and then select the "Go" button.



## Manage 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.

1. Open the PO and navigate to the **Change Requests** tab.

Documents > Document Search > Search Documents > Status - PO P00002618

PO/Reference No. **P00002618 Revision 3**  
 Supplier **B & B Microscopes LTD.**

Status Purchase Order Revisions PO Approvals Shipments **Change Requests (3)** Invoices/Credits Comments (1) Attachments History

General Information		Document Status
PO/Reference No.	<b>P00002618</b>	A/P status
Revision No.	3	Workflow
Supplier Name	B & B Microscopes LTD. <a href="#">more info...</a>	Distribution
Purchase Order Date	5/29/2019	Distribution Date/Time
Total	370.00	Supplier
Owner Name	Department Buyer1	
Owner Department	Dent Med-Office of the Dean (Dent Med-Office of the Dean)	
Owner Phone	+1 412-555-2424	
Owner Email	dummyspb@gmail.com	
Requisition Number	118735477 <a href="#">view</a>   <a href="#">print</a>	

Line Item Status		Catalog No	Size / Packaging	Unit P
1	✓ Microscope Part 1 <a href="#">more info...</a>	ABC123	EA	11

2. Select the **Change Request** number.

Documents > Document Search > Search Documents > Change Requests - PO P00002618

PO/Reference No. **P00002618 Revision 3**  
 Supplier **B & B Microscopes LTD.**

Status Purchase Order Revisions PO Approvals Shipments **Change Requests (3)** Invoices/Credits Comments (1) Attachments History

Status	Change Request Details
<b>Completed</b>	<b>118736957</b> Owner Department Buyer1 Created 5/29/2019
<b>Completed</b>	<b>118739518</b> Owner Department Buyer1 Created 5/29/2019
<b>Completed</b>	<b>118749730</b> Owner Department Buyer1 Created 5/29/2019

3. Navigate to the **Change Request Approvals**.

**Change Request:**  
**118736957**  
2019-05-29 dbt1 01 - CR

Status: **Completed**  
Document Total: **370.00 USD**  
[View Related Documents](#)

Change Request ▾

**Summary**

- General
- Shipping
- Billing
- Accounting Codes
- Internal Notes and Attachm...
- External Notes and Attachm...
- Supplier Information
- Taxes, Shipping & Handling
- Change Request Approvals
- Comments

**Summary**

---

**External Communication Options**

Resend to Suppliers on Change Request false

Resend to ERP System Connections on Change Request false

▼ **General**

Status	✓ Completed (5/29/2019 11:44 AM)
Submitted	5/29/2019 11:44 AM
Requisition Name	2019-05-29 dbt1 01 - CR
Description	<i>no value</i>
Prepared by	Department Buyer1
Department	Dent Med-Office of the Dean (Dent Med-Office
Approval Priority	Normal

▼ **Shipping**

4. 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.

**Change Request:**  
**118736957**  
2019-05-29 dbt1 01 - CR

Status: **Completed**  
Document Total: **370.00 USD**  
[View Related Documents](#)

Change Request ▸

**Change Request Appro...**

Comments

Attachment Overview

**Change Request Approvals** Document Actions ▾ | History | ?

Submitted

Department Buyer1  
5/29/2019 11:44 AM

Intermediate Validation

Completed ✓

Final Validation

Completed ✓

Create PO

Completed ✓

Completed

5/29/2019 11:44 AM

## 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.



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 PO until approved. No change will be made to the current PO until all required approvals have been made. 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 PO. 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

## Approver Information

### Approver Notifications

Approvers will be notified via email when they need to take an action. These actions include:

- Approving the request
- Editing the request prior to approval
  - Use the [Add Non-Catalog Item feature](#) to add a line
  - [Cancel](#) a line or multiple lines on a PO
- Returning the request to the originator
- Rejecting the request



## Navigating to the Change Request

Approvers can get to the Change Request by selecting the link from the email notification or by navigating to the request within the PantherExpress System.

Within the system, the navigation steps are as follows:

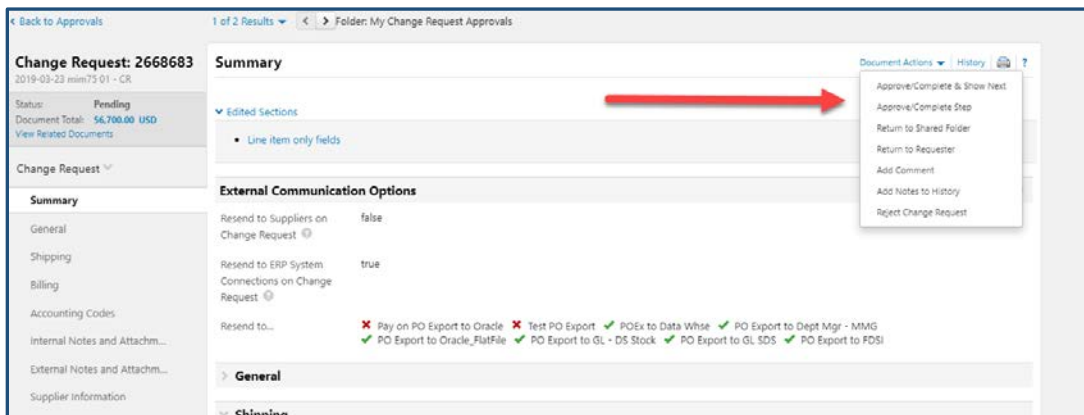
1. Documents
2. Approvals
3. Select My Approvals from the filter approval area on the left side of the screen
4. Go to type
5. Select Change Request

## Pending Approvals

Approvers will see all of the Change Requests that are pending their approval. Just like you assign an approval to yourself today, you can assign a Change Request to yourself from the Change Request screen.

## Document Actions

The Document Actions menu contains all of the commands related to approving a Change Request. This menu is located at the top right of the screen and from the drop-down arrow you can Choose to Approve, Return, or Reject the request. Selecting the option performs the option. **You do not need to click GO after clicking the option.**



## Returning the Change Request

The change request can be returned to the buyer that submitted the request. If it is returned to the buyer, no change is made to the PO.

When a change request is returned to the originator of the request it will remain in a *draft* state and the status will show as *pending*. Purchase Orders with pending Change Requests, cannot have a new request added to the PO until the first request is completed. No new change request can be created until this change request is either resubmitted or the draft is deleted by the originator.

If there is a pending draft change request the Change Request option does not appear in the available actions dropdown box.

## Rejecting the Change Request

Rejecting the Change Request cancels the request. The request will be in a completed state as opposed to the pending state created by returning the Change Request. Rejecting the request will return the PO to the original state before the Change Request was submitted; no changes will have been made to the PO.

## Change Requests Statuses:

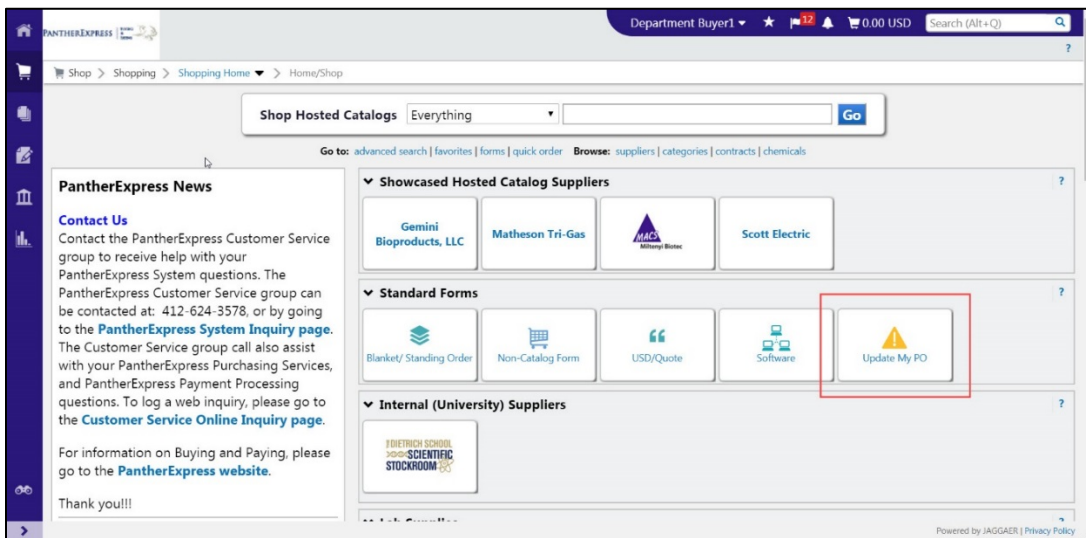
- **Pending** – The Change Request is pending approval
- **Merge** – The Change Request was approved and the requested changes are being made to the PO but not fully completed
- **Completed** – The Change Request was approved and all changes have been made to the PO
  - *Note:* The PO will have a revision 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 PO
- **Rejected** – The Change Request was rejected
  - *Note:* When a Change Request is rejected, no changes are made to the PO

# Update My PO Form

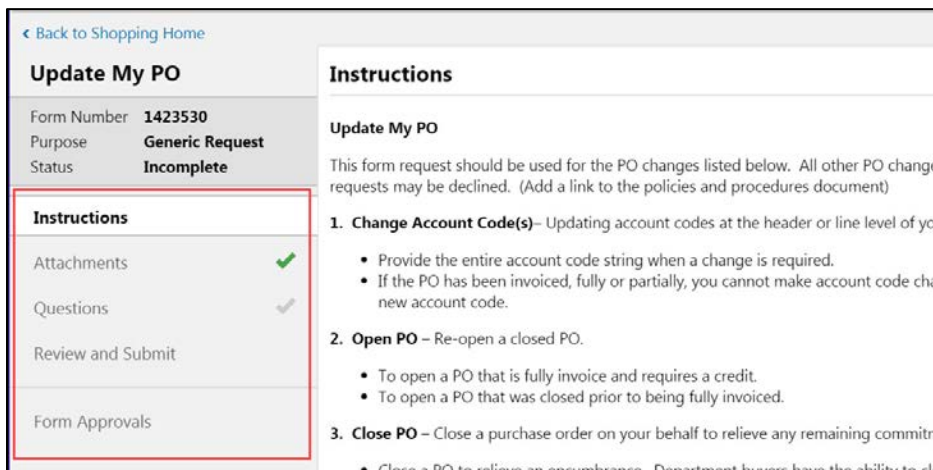
The Update My PO form is being introduced as a means for buyers, approvers, and specialty forms users to request certain changes that can no longer be made directly by the user. This change to the process is in coordination with other budgetary projects and initiatives across the Office of the CFO and 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 PO, closing a PO, and changing the PO 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.

Shop > Shopping > View Forms > Instructions

Back to Shopping Home

### Update My PO

Form Number: 1423530  
Purpose: Generic Request  
Status: Incomplete

#### 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. (Add a link to the policies and procedures document)

- 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.
- 5. Other**
  - Please describe your issue or question as clearly as possible, so that we may provide assistance. NOTE: Your request may be declined if your request is outside of the established policies and procedures.

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 PO has been invoiced (either partially or in full) your Update My PO form will be rejected. To change an account code on a PO 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 PO

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

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

## Close PO

Department buyers have the ability to 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 formL

- 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.

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

## Change PO Owner

You may use the Update My PO form to change a PO owner when a buyer has separated from the University or no longer has buyer privileges. The 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 and 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 attach an email from the supervisor requesting the change.

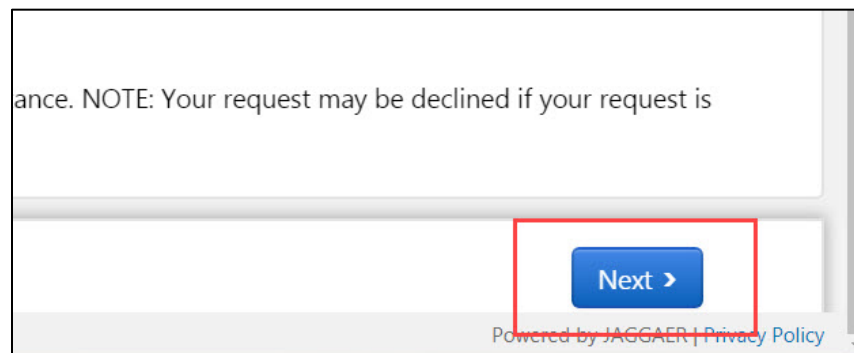
## Other

Please describe your issue or question as clearly as possible, so that we may provide assistance.

**Note:** Your request may be declined if your request is outside of the established policies and procedures.

## Using the Update My PO Form

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.

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

Update My PO

Form Number: 1423530  
Purpose: Generic Request  
Status: Incomplete

Attachments:

Questions:

Review and Submit

Form Approvals

Attachments: Please add your attachments below.  
[Add Attachment](#)

Request Actions | History ?

< Previous Save Progress Next >

## Questions

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

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

Please provide all of 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.

## Example: 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.

Update My PO

Form Number: 1423530  
Purpose: Generic Request  
Status: Incomplete

Questions - Page 1

Request Actions | History ?

★ Response Is Required

Questions:

PantherExpress PO# \*

P00002618

What type of change are you requesting? \*

Change Account Codes  Open PO  Other  
 Change PO Owner  Close PO

Enter either the new code string or describe, in detail, the change you need to make. \*

02.49010.6010.00000.000000.00000

1968 characters remaining

Attach documentation supporting or describing your requested account code change here

No File Attached

Upload

Uploaded attachment will be copied to the invoice.

< Previous Save Progress Next >

## Example: Change PO 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.

Update My PO	Questions - Page 1	Request Actions	History	?
Form Number <b>1423530</b> Purpose <b>Generic Request</b> Status <b>Incomplete</b>				
Instructions				
Attachments				
<b>Questions</b>				
Review and Submit				
Form Approvals				
	<p><b>Questions</b></p> <p>PantherExpress PO# *</p> <input type="text" value="P00002618"/>			
	<p>What type of change are you requesting? *</p> <p><input type="checkbox"/> Change Account Codes   <input type="checkbox"/> Open PO   <input type="checkbox"/> Other</p> <p><input checked="" type="checkbox"/> Change PO Owner   <input type="checkbox"/> Close PO</p>			
	<p>New Owner *</p> <input type="text" value="Jordan Miller, jmmiller"/>			
	<p>Additional Details for Change of Ownership</p> <div style="border: 1px solid #ccc; padding: 5px;"><p>Jordan will follow up on this order while I am on vacation</p></div> <p>1942 characters remaining</p>			
	<p>If more than one PO requires a change in ownership, attach supporting documentation (e.g. a list or spreadsheet) here.</p> <p>No File Attached</p> <p><input type="button" value="Upload"/></p> <p>Uploaded attachment will be copied to the invoice.</p>			
		<input type="button" value="Previous"/>	<input type="button" value="Save Progress"/>	<input type="button" value="Next"/>

## Review and Submit

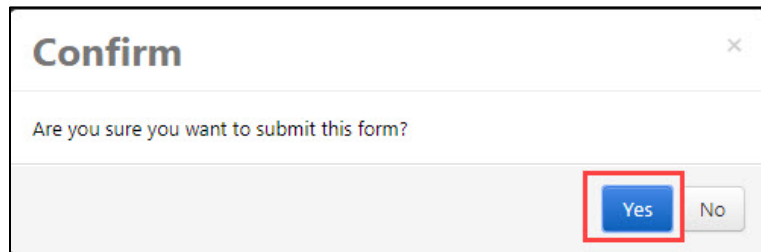
On this page you can see a summary showing what screens have been completed.

- 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 field have been completed the **Submit** button will be available.

Use the **Submit** button to submit the form.

Update My PO	Review and Submit	Request Actions	History	?						
Form Number <b>1423530</b> Purpose <b>Generic Request</b> Status <b>Incomplete</b>	<p> Required Fields Complete</p>									
Instructions										
Attachments										
Questions										
<b>Review and Submit</b>										
Form Approvals										
	<table><thead><tr><th>Section</th><th>Progress</th></tr></thead><tbody><tr><td>Attachments</td><td> Required Fields Complete</td></tr><tr><td>Questions</td><td> Required Fields Complete</td></tr></tbody></table>	Section	Progress	Attachments	Required Fields Complete	Questions	Required Fields Complete			
Section	Progress									
Attachments	Required Fields Complete									
Questions	Required Fields Complete									
		<input type="button" value="Previous"/>	<input type="button" value="Add to Favorites"/>	<input type="button" value="Submit"/>						

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.

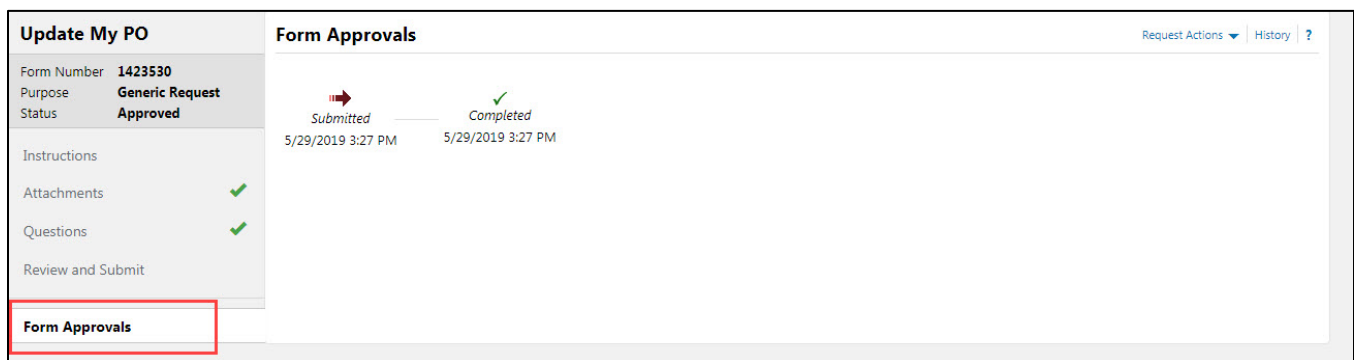


After submitting, a notification message will indicate that the submission was successful. You can find your submitted Update My PO form requests in your Documents.

## 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.



# Purchasing Non-Catalog Items through the Shopping Menu

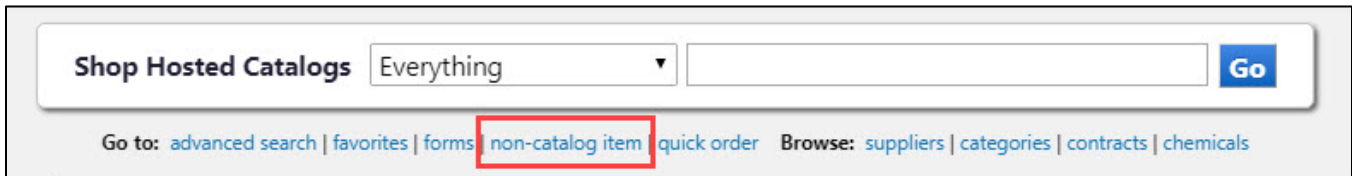
You can quickly and easily add non-catalog items to a shopping cart. Non-catalog items can be entered when you cannot find the item needed from Hosted Catalogs or Punchouts.

**Important Note:** Before you purchase an item through non-catalog item ordering, be sure that the item is not available from a Hosted Catalogs or Punchout. You should always order from one of those sources when available.

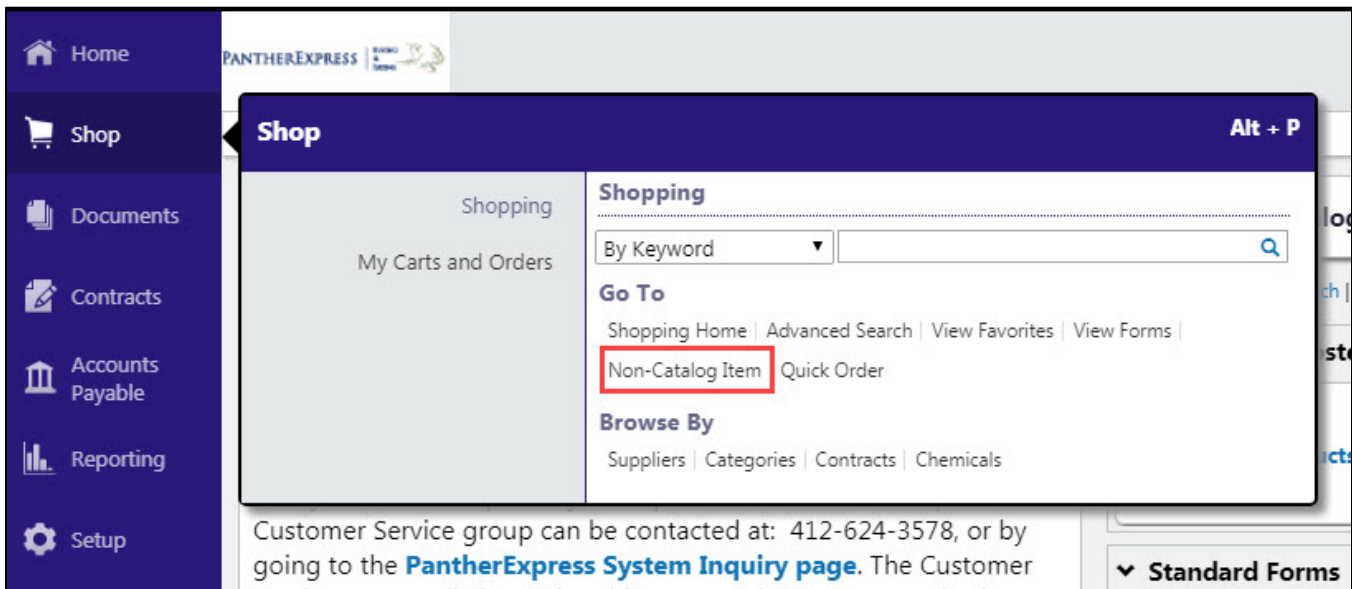
## Access

There are two ways to access the non-catalog item ordering feature.

1. From the **home** page, use on the **non-catalog item** link which is the second-to-last item in the “Go to” menu.



2. From the **Shop** menu on the left side of the home page, select **Non-Catalog Item** under the “Go To” section.



## The Non-Catalog Item overlay window

The Non-Catalog item overlay window looks similar to the one shown below.

Required information is indicated with bold headings. This is all information except the Product Details which includes a button to Add Internal Attachments as well as a checkbox list to select product types.

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA

254 characters remaining [expand](#) | [clear](#)

Controlled substance  
 Recycled  
 Hazardous material  
 Radioactive  
 Rad Minor  
 Select Agent  
 Toxin  
 Energy Star  
 Green

[Save and Close](#) [Save and Add Another](#) [Close](#)

The steps below may vary by organization. Some sites and users are set up to bypass the SKU search, while it is required for others. The steps below assume the Bypass the SKU search permission is enabled. Additionally, it is assumed that the permissions to add a new supplier is off, so only the selection from existing suppliers is permitted.

### Enter Supplier Name

Enter the supplier name or information in the Enter Supplier box. As you begin typing the Auto Complete/Type-Ahead functionality will display. Suppliers are ordered by best match and display with associated preference icons. The first eight matches are listed with a link to display all matches based on the entered criteria.

When the supplier is selected, the preferred fulfillment center is defaulted. You can change the fulfillment information by using the “select different fulfillment center” link. From the popup window, use the Select link to enter the appropriate address.

### Order Distribution Methods

You can also select the distribution method for your order using the Non-Catalog Item screen. The order distribution method is how the purchase order will be sent to the supplier. A screenshot of the Non-Catalog Item window with the supplier’s Distribution Methods link expanded is provided under the Save and Close or Save and Add Another heading below.

**Note:** It is extremely important to select a distribution method for your order. Make sure you have the correct FAX number, or an email address set for order distribution. For multi-line item orders, you only need to select the distribution method once.

## Fill in All Required Fields

Required fields are indicated with bold font and include Product Description, Catalog No, Quantity, Price Estimate, and Packaging.

You can submit additional, optional, information using the Product Details link. This will expand the information on the screen for you to make selections regarding the product type or to add attachments. If you select the Product Details link again, it will hide these fields.

## Save Options

If you only want to order one item from the supplier, use the **Save and Close** button.

If you want to order multiple items from the supplier or another supplier, use the **Save and Add Another** button. The screen will empty except for the supplier. It will allow you to build a cart with as many non-catalog items as you need and you will see the list of items you've selected at the top of the Non-Catalog Item window.

**Non-Catalog Item** ? X

**Recently added items:**

Supplier Name	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity
B & B Microscopes LTD.	Lamp	123456	EA	10.00 USD	1 EA
B & B Microscopes LTD.	Lamp2	645321	EA	15.00 USD	1 EA

**B & B Microscopes LTD.** [select different supplier](#)  
490 LOWRIES RUN RD, Pittsburgh, Pa 15237 US

**Distribution Methods**  
The system will distribute purchase orders using the method(s) indicated below:  
 Check this box to customize order distribution information.  
Fax  +1 919-659-6100  
Email (HTML Body)

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA

254 characters remaining [expand](#) | [clear](#)

**Product Details**

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

## Finishing Your Non-Catalog Item Order

When you have finished adding all of the items to your order, use the **Save and Close** button.

The item(s) that were added can be viewed in your shopping cart. To edit the non-catalog item once added to the cart, simply select the item name from the card and the non-catalog item popup window will display.

# Commitment Relief

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 PO; 2 boxes of paper for \$35 on the invoice.

## Cancelling an entire purchase order or purchase order line.

Commitments against accounts will remain until the commitment is relieved. 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 commitment relief in the PantherExpress system.

Sending a cancellation to Oracle will relieve the remaining commitment for an entire PO or a PO 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 PO with the supplier.

## 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 PO or the line items before making this request.

## Punch-out Orders: Commitment Relief

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

This cannot be undone. You must be sure you are not expecting any additional invoices against the PO or any credit memos before manually closing the purchase order.

# Auto-close Purchase Orders in the PantherExpress System

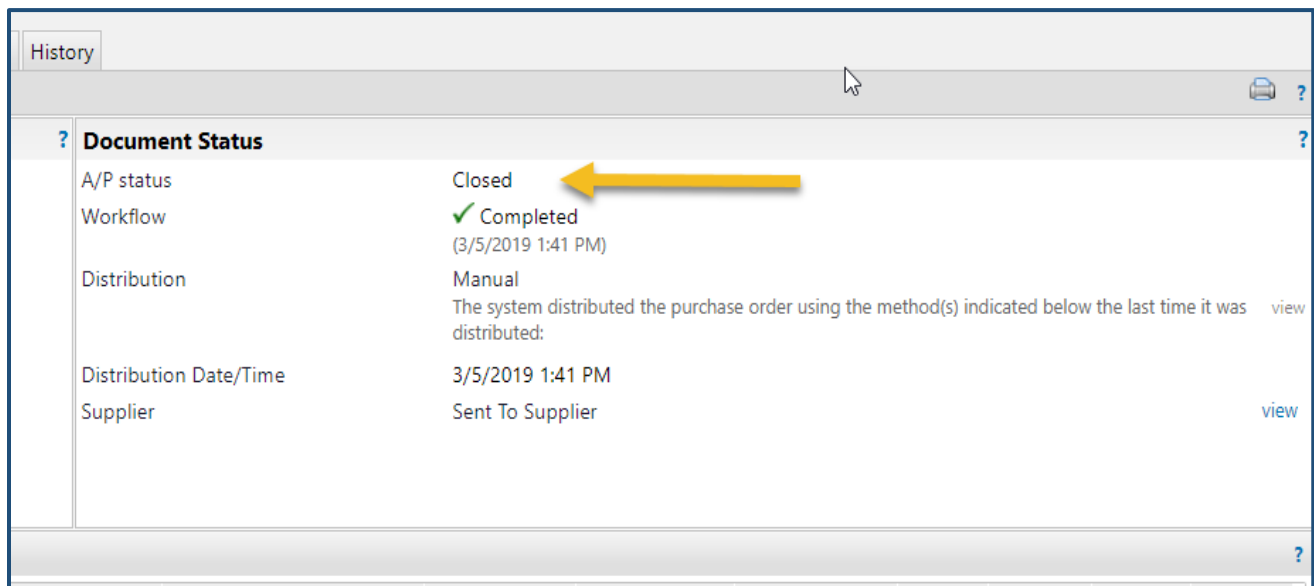
As of April 1, 2019, fully invoiced purchased orders are automatically closed by the PantherExpress System. Once an invoice(s) have been received that result in a fully invoiced purchase order line status, the system will automatically close the purchase order. This process will take effect for all new purchase orders created in the System after the effective date.

This procedural change was part of a budgeting project across all areas of the Office of the Chief Financial Officer to ensure all purchase orders invoiced have the commitments relieved in Oracle. Closing the POs will prevent problems with the commitment relief.

Any PO that is automatically closed by the system can be re-opened however, manually closed POs cannot be reopened.

## Status Designation

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



The Closed status is shown in the Document Status section on the Status screen of the Purchase Order. The Closed status will also appear at the top of the screen in the PO/Reference No. area.

## System Change Information

This system change will ensure that the purchase order and invoice information matches between the PantherExpress System and PRISM (Oracle). This match is necessary to allow PantherExpress System data to feed information accurately to the Oracle Planning and Budget module for encumbrance accounting, and to match an Oracle system default.

Automatically closing purchase orders also eliminates risk of a supplier over invoicing a purchase order that has been fully invoiced and paid.

## 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 PO 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.

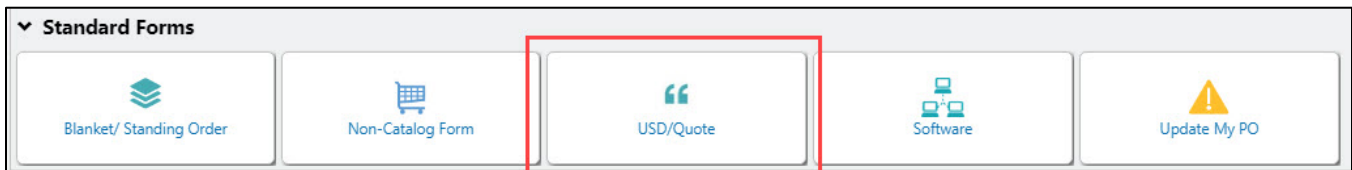
### Multiple Line Item POs: quantity dependent

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.

# USD/Quote Form in the PantherExpress System

A USD/Quote form has been added to the Standard Forms showcase on the PantherExpress home screen. This form allows PantherExpress buyers to enter orders and quotes for single-quantity, non-catalog items at a fixed amount using US Dollar (USD) as the unit of measure. This form must not be used to make software purchases.

**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.



The USD/Quote form is the third form in the Standard Forms showcase on the PantherExpress home page.

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

## Completing the Form

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 indicated 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.

Quote Form		Available Actions: Add and go to Cart <input type="button" value="Go"/> <input type="button" value="Close"/>	
<b>USD/Quote Form</b> ?			
<p><b>Instructions:</b> This form should be used when you need to place an order using the US Dollar (USD) unit of measure. This form should also be used to enter orders based on a quote received from a supplier. The USD unit of measure is hard coded in the form, and is defaulted to a quantity of one (1). If you are submitting a quote, it is recommended best practice to attach a copy of the quote to your order.</p> <p>Detailed information about using the USD/Quotes form can be found in the <a href="#">the USD/Quote reference guide</a>. We recommend using this reference to help answer questions you may have about the forms usage.</p> <p><b>DO NOT USE THIS FORM TO PLACE A BLANKET ORDER</b></p>			
<p><b>Part A. Supplier Information</b> ?</p> <p><b>University policy</b> requires the use of contracted suppliers. Before adding a supplier, you must first check the <a href="#">contracted supplier list</a>. Low-value, one-time purchases that are not available from a University contracted supplier should be obtained by using a University P-card.</p> <p>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 <b>PantherExpress Website (Supplier Verification Form)</b> for detailed information regarding adding a New Supplier, the Supplier Verification Form, and W-9 or W-8 requirements.</p>	<p><b>Part A. Supplier Information</b> ?</p> <p><b>Enter Supplier</b> <input type="text"/></p> <p>or <a href="#">Supplier Search</a></p>		
<p><b>Part B. Details</b> ?</p> <p><b>Catalog Number:</b> - This is a required field. Enter the item identification or quote number in this field. If the Quote Number is not known, enter "N/A" or "Unknown".</p> <p><b>Product Description:</b> Enter in a detailed description of the product being purchased.</p> <p style="text-align: center;"><b>Capital Asset</b></p> <p><b>University policy 05-10-01</b> requires departments to ensure that all equipment purchases meeting the capitalization criteria below are charged to the proper account number and <b>sub-code</b></p> <ul style="list-style-type: none"> <li>• Fixed or moveable equipment with a <b>unit acquisition cost of at least \$5,000.00 or greater</b></li> <li>• Minimum useful life of at least two years</li> </ul> <p>Account number sub-code usage  <a href="http://www.cfo.pitt.edu/prism/accountno.php">http://www.cfo.pitt.edu/prism/accountno.php</a> (select "Expenses" – scroll to 61xx sub-codes)</p> <p>For more information, contact <a href="mailto:assets@cfo.pitt.edu">assets@cfo.pitt.edu</a></p>	<p><b>Part B. Details</b> ?</p> <p><b>Catalog No.</b> <input type="text"/></p> <p><b>Product Description</b> <input type="text"/></p> <p>254 characters remaining <a href="#">expand</a>   <a href="#">clear</a></p> <p>Packaging (UOM) <input type="text" value="10 - Group"/></p> <p><b>Total</b> <input type="text"/></p> <p>Health and Safety</p> <ul style="list-style-type: none"> <li><input type="checkbox"/>  Controlled substance</li> <li><input type="checkbox"/>  Recycled</li> <li><input type="checkbox"/>  Hazardous material</li> <li><input type="checkbox"/>  Radioactive</li> <li><input type="checkbox"/>  Rad Minor</li> <li><input type="checkbox"/>  Select Agent</li> <li><input type="checkbox"/>  Toxin</li> <li><input type="checkbox"/>  Energy Star</li> <li><input type="checkbox"/>  Green</li> </ul> <p><b>CAPITAL ASSET INFORMATION</b></p> <p><input type="checkbox"/> If your purchase meets the capital asset definition, you <b>MUST</b> use subcode range <b>6100-6199</b>.</p> <p>Capital Expense <input type="text"/></p> <p>Capital Asset Subcode Usage <input type="text"/></p> <p>Contract <input type="text"/></p>		
<p><b>Part C. Notes and Attachments</b> ?</p> <p>For general information and resources regarding Purchasing refer to <a href="#">Purchasing Guides and Tools</a>.</p> <p>For attachment requirement details refer to <a href="#">Requisition Checklist</a>.</p> <p><b>Please note:</b></p> <p><b>1. The requestor and approver of the Directed or Sole Source Justification Form</b> need to have completed the conflict of interest forms in <a href="#">HS-Connect</a> before signing the <b>Directed or Sole Source Justification Form</b>. The approver must be a Dean, Department Chairperson or Department Director with title listed on form.</p> <p><b>2. A Certificate of Insurance</b> 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 <a href="#">Office of Risk Management's insurance requirements</a></p> <p><b>3. The Software License Review</b> (only for software licenses not purchased through CSSD) process must be followed for purchases of software.</p>	<p><b>Part C. Notes and Attachments</b> ?</p> <p>Internal Attachments <input type="button" value="Add Attachments"/></p> <p>External Attachments <input type="button" value="Add Attachments"/></p> <p>Note to Supplier <input type="text"/></p> <p>1000 characters remaining <a href="#">expand</a>   <a href="#">clear</a></p>		

The USD/Quotes form has instructions at the top. Each section of the form has details and information in the left-side column. Within the form, entry fields that are bolded are required; fields not labeled with bold text are optional.



## USD/Quote Form 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.”

**Quote Form** Available Actions: Add and go to Cart **Go** **Close**

**USD/Quote Form** ?

**Instructions:** This form should be used when you need to place an order using the US Dollar (USD) unit of measure. This form should also be used to enter orders based on a quote received from a supplier. The USD unit of measure is hard coded in the form, and is defaulted to a quantity of one (1). If you are submitting a quote, it is recommended best practice to attach a copy of the quote to your order.

Detailed information about using the USD/Quotes form can be found in the [the USD/Quote reference guide](#). We recommend using this reference to help answer questions you may have about the forms usage.

**DO NOT USE THIS FORM TO PLACE 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 transaction 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 of 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:

- **FAX:** If your order needs to be FAXED to the supplier ensure the FAX check box is checked, and the FAX number listed is correct. You can edit the FAX number if needed.
- **EMAIL (HTML BODY):** Ensure the EMAIL check box is checked if your order needs to be emailed to the supplier. Make sure the email address in this field is correct. You may change the EMAIL address if needed.

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

Part A. Supplier Information ?	Part A. Supplier Information ?
<p><b>University policy</b> requires the use of contracted suppliers. Before adding a supplier, you must first check the <a href="#">contracted supplier list</a>. Low-value, one-time purchases that are not available from a University contracted supplier should be obtained by using a University P-card.</p> <p>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 <b>PantherExpress Website (Supplier Verification Form)</b> for detailed information regarding adding a New Supplier, the Supplier Verification Form, and W-9 or W-8 requirements.</p>	<p><b>Supplier</b> B &amp; B Microscopes LTD. <a href="#">more info...</a> <a href="#">select different supplier</a></p> <p><b>Fulfillment Address</b> Fulfillment Address 1: (preferred) 490 LOWRIES RUN RD Pittsburgh, Pa 15237 US</p> <p><b>Distribution</b> The system will distribute purchase orders using the method(s) indicated below: Check this box to customize order distribution information. <input checked="" type="checkbox"/></p> <p>Fax <input checked="" type="checkbox"/> +1 919-659-6100</p> <p>Email (HTML Body) <input type="checkbox"/></p>

## 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 B. Details ?	Part B. Details ?
<p><b>Catalog Number:</b> - This is a required field. Enter the item identification or quote number in this field. If the Quote Number is not known, enter "N/A" or "Unknown".</p>	<p><b>Catalog No.</b> ABCD1234</p>
<p><b>Product Description:</b> Enter in a detailed description of the product being purchased.</p>	<p><b>Product Description</b> See the attached quote for janitorial products 208 characters remaining <a href="#">expand</a>   <a href="#">clear</a></p>
<p><b>Capital Asset</b></p>	<p>Packaging (UOM) 10 - Group</p>
<p>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 <b>sub-code</b></p> <ul style="list-style-type: none"><li>Fixed or moveable equipment with a <b>unit acquisition cost of at least \$5,000.00 or greater</b></li><li>Minimum useful life of at least two years</li></ul>	<p><b>Total</b> 3500</p>
<p>Account number sub-code usage <a href="http://www.cfo.pitt.edu/prism/accountno.php">http://www.cfo.pitt.edu/prism/accountno.php</a> (select "Expenses" – scroll to 61xx sub-codes)</p> <p>For more information, contact <a href="mailto:assets@cfo.pitt.edu">assets@cfo.pitt.edu</a></p>	<p>Health and Safety</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Controlled substance</li><li><input type="checkbox"/> Recycled</li><li><input type="checkbox"/> Hazardous material</li><li><input type="checkbox"/> Radioactive</li><li><input type="checkbox"/> Rad Minor</li><li><input type="checkbox"/> Select Agent</li><li><input type="checkbox"/> Toxin</li><li><input type="checkbox"/> Energy Star</li><li><input type="checkbox"/> Green</li></ul>
	<p><b>CAPITAL ASSET INFORMATION</b></p> <p><input type="checkbox"/> Capital Expense</p> <p>Capital Asset Subcode Usage If your purchase meets the capital asset definition, you <b>MUST</b> use subcode range <b>6100-6199</b>. <a href="#">select contract...</a></p>
	<p>Contract</p>

## 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.

**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

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.

Available Actions: Add and go to Cart Go Close

Add and go to Cart

Add to Cart and Return

Add to Cart

Add to Draft Cart or Pending PR/PO

Add to PO Revision

Add to Favorites

Add to new Cart

Complete the purchase as you would do with any other form.

## Quick Reference: Change Transactions by Purchasing Method

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	<b>No</b> – Instead you must create a new order.				<b>NA</b>	
After Invoicing	<b>No</b> – Instead you must create a new order. Only exception to rule is correcting a NOID.				<b>NA</b>	

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