Order History

Chapter 3
Order History

Section Objectives

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

- View requisition details
- View the progress of requisitions through the approval and submission process
- Print a copy of a requisition
- View the approver on an order pending Department Approval
- View Purchase Order History
- Copy an existing cart to a new cart
Order History

Requisition History

Purchase requisition history contains details about the requisition process, including the items ordered and the requisition approval process.

- Recently submitted requisitions (within one month) are all shown in a convenient place – My Requisitions.
- The progress of these requisitions can easily be followed from this central place.
- The name of the next approver can be found on any order pending Department Approval.
- After one month, requisitions are removed from the My Requisitions list. They are still visible through PR History.
- Details about any items that were rejected or approved are found here.
- Once a Requisition becomes a purchase order, the data can be found through Purchase Order History, or by selecting the associated PO # link.

Purchase Order History

Purchase order history contains details about the purchase order process including the items ordered and the associated requisitions.

- Information about order distribution is provided, including when the order was sent to the supplier.
My Requisitions

View the History of the recent orders you have created.

1. Navigate to the History screen.

    Panther Buy
    N → History

2. Click on tab. This will pull up all requisitions placed in the past month.

3. The following information displays

   • Status
     - Requisition pending approval
     - Requisition approved
     - Requisition rejected
     - Approved, but line item(s) rejected
     - Requisition withdrawn
     - Pending, but line item(s) rejected

   • Requisition No.
   • Requisition Name
   • Requisition Date/Time
My Requisitions

- Requisition Total

4. View the contents of a requisition by clicking on the Requisition #.

5. If account codes were entered for individual line items, to view the accounts click on the Accounting Codes tab.

6. If the order is Completed (approved), you can view / print the Purchase Order.

7. If the order is Rejected, click on the History tab to see whether the system or an approver rejected the order, and for what reason.
### My Requisitions

In the above example, the system rejected the requisition due to an invalid account number.

8. If the order is *Pending Department Approval*, click on the PR Approvals tab to see what step of the approval sequence the order is in.

- The Active step is the current step of the Approval process.
My Requisitions

- To view the approver on this order, click the view approvers link.

9. If the status of the order is Approved, but line item(s) rejected, scroll to the line items area to see what was approved and what was rejected.
My Requisitions

Print a Copy of a Requisition

1. Click on History, My Requisitions, then the Requisition No. Notice the printer icon in the right hand corner.

2. Click on the Printer Icon.
   - A copy of the document is placed in your browser window.

3. Click on File, Print or a printer icon if it displays in your browser window.

4. Close the browser window to return to the PantherBuy screen.

Remove an item from a multi-line order awaiting approval

1. View the order to VWR for the video camera & powerpack.

2. Notice that the status is pending approval.

3. Scroll down to the Supplier/Line Item Details area.
   - Click in the checkbox for the powerpack kit.

4. Click in the drop down menu at the top of this region and select Withdraw Selected Items.

5. Click Go.

6. Enter a reason for withdrawing the item.
**My Requisitions**

7. Click on *Withdraw Line Item(s)*.

8. Scroll to the Line Items Details region.

9. Notice the symbol at the beginning of the line item.

```
<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Powersack</em> Kit</td>
<td>33500-762</td>
<td>1/EA</td>
<td>700.68</td>
<td>1 EA</td>
<td>700.68 USD</td>
</tr>
</tbody>
</table>
```

10. The red arrow designates that the line has been withdrawn.

    **NOTE:** An entire order that is awaiting approval can be withdrawn by selecting all of the line items, and then selecting from the drop down menu *Withdraw Selected Items*.

11. Return to *My Requisitions*.

**PR History**

1. Click on the PR History tab.

2. The *PR History* screen can be used to search for a specific requisition(s).
3. Requisitions can be searched for by

- Requisition Name
- Requisition Number
- Supplier Name
- Catalog No.
- Date Range
- Account Number
**PR History**

4. Search for the requisitions you created by a start and end date.

5. Click in the *Filter* check box.

6. Enter a start and end date, using the calendar function.

7. Click on the *Search*.

8. Your search results will display.

   • If the search will yield a large number of records, you can set the number of records that display per page with the *Results per page* option.
PO History

Once a requisition is approved the order can also viewed under *My Purchase Orders* and *PO History*. The information you find in these two screens is similar to *My Requisitions* and *PR History*.

My Purchase Orders

1. Click on the My Purchase Order tab.
2. The following information displays
   - Workflow status
   - PO No. (You would click here to open the PO)
   - Supplier
   - Creation Date/Time
   - PO Total
   - Requisition No.
   - Requisitioner
   - Supplier Status

*Note*: An order is assigned a PO number once it receives department approval. A PO will display with the status of *Requires Approval* if:
   - An order is over $5,000 and is awaiting Purchasing Services approval.
   - An order is over $5,000 and is awaiting OK to Pay approval.
   - An order is for radioactive substance(s) and is awaiting Radiation Safety approval.
   - An order contains DHS Chemicals of Interest and is awaiting EH&S approval.
PO History

PO History

The PO History screen can be used to search for a specific requisition(s).

1. PO’s can be searched for by Purchase Order or Requisition information:
   - Requisition name
   - PO or Requisition No.
   - Supplier Name or Catalog No. (by Requisition)
   - Date Range
   - Account Number

2. Search for the Purchase Orders you created by a Start and End Date
   - Enter dates using the calendar function

3. Click on the Search button.
PO History

4. Your results will display.

5. Click on the PO No. to view PO details.

6. Click on the Tabs (Status, Purchase Order, PO Approvals, etc.) to review additional PO details.
**PO History - Copy Cart**

Copy an existing Cart to a New Cart

*(NOTE: This can only be done with items from Hosted Catalog Suppliers)*

The Copy to New Cart feature can be a time-saving way to create repetitive orders or to edit a rejected order.

1. Click on My Requisitions tab.
2. View the order that has a status of Rejected.
   - Locate the Requisition and click on the Requisition Number.
3. Click on the Available Actions drop-down arrow.
4. Select Copy to New Cart.
5. Click on Go.
6. A new Cart is created and a new Requisition number will be assigned.
7. Click on Review.
8. Edit the new document.
   - Correct the account no. by changing the Entity to “04”
PO History - Copy Cart

9. Submit the requisition.

10. Notice that a new requisition number has been created.