Non-Catalog Item Requisition Training Guide

"ADDING and REPLYING TO COMMENTS"

(Revised, Nov. 2021)

ADDING A COMMENT

From the **SUMMARY** page

- Click the **COMMENTS**

Purchase Orders ▾   Search (Alt+Q)   401.56 USD 🛒   ♡   🚩 3   394 👤

Requisition • 150718510 ▾   ☰   👁   🖨   ❓   Assign Cart   **Submit Requisition**

Summary   Taxes/S&H   PO Preview   Comments   Attachments   History

General ✏ ⋯

Description	no value
Prepared by	Kevin James
Prepared for	Kevin James
PO Clauses	7 Edit	View details
Executive Orders	no value
Standing Order	✗

Shipping ✏ ⋯

Ship To
ATTN: Kevin James
Central Receiving Dept.
Rm B019 T Cole SRC Bldg
266 Lee St.
Atlanta, GA 30314
United States

Delivery

Expedite   ✗

Ship Via   Best Carrier-Best Way

Billing ✏ ⋯ ▾

Bill To
Clark Atlanta University
Attn: Accounts Payable
223 James P Brawley Dr. SW
Atlanta, GA 30314
United States

Billing Options

Accounting Date   no value

Draft

Total (401.56 USD)	▾
Subtotal	401.56
Shipping	0.00
Handling	0.00
	401.56

What's next for my order? ▾

Next Step	Purchasing Buyer Review
Approvers	Alexander, Michelle
	Byrd, Donna
	James, Kevin

Workflow   ⧉ 🖨

◯ Show skipped steps

● **Draft**
Active
Kevin James

◯ Banner Budget Authorization ⋯
Future

◯ **Purchasing Buyer Review** ⋯
Future

◯ **Special Approval** ⋯
Future

Accounting Codes ✏ ⋯ ▾

Chart	Fund	Organization	Account	Program	Activity
C	110000-CAU	40203-CAU	7129-CAU	10-CAU	no value
Clark Atlanta University	Current Unrestricted Operations	Purchasing	Other Misc Supplies	Instruction	

Internal Notes and Attachments ✏ ⋯

Internal Note	no value
Internal Attachments	Add

External Notes and Attachments ✏ ⋯ ▾

Note to all Vendor	no value
Attachments for all vendor	Add

4 Items ☐ ▾

Purchase Orders ▾   Search (Alt+Q)   401.56 USD 🛒   ♡ ⚑ 3   394 👤

Requisition · 150718510 ▾   ☰ 🖶 ❓   Assign Cart   **Submit Requisition**

Summary   Taxes/S&H   PO Preview   **Comments**   Attachments   History

Records found: 0   Show comments for

All

Requisition

Purchase Order

Invoice

Receipt

No comments have been added
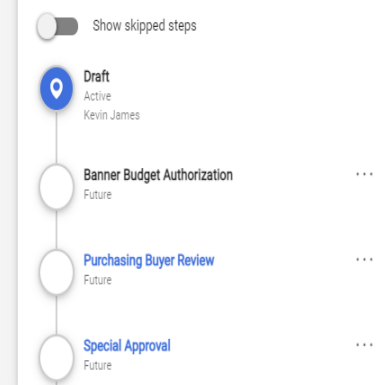
+

Draft

Total (401.56 USD)   ⌄

Subtotal   401.56
Shipping   0.00
Handling   0.00
                        ───────
                         401.56

You can add a COMMENT to a **REQUISITION, PURCHASE ORDER, INVOICE,** or **RECEIPT**

What's next for my order?   ⌄

Next Step   Purchasing Buyer Review

Approvers   Alexander, Michelle
             Byrd, Donna
             James, Kevin

Workflow   ⬀ 🖶

◯ Show skipped steps

📍 **Draft**
   Active
   Kevin James

◯ **Banner Budget Authorization**
   Future   ⋯

◯ **Purchasing Buyer Review**
   Future   ⋯

◯ **Special Approval**
   Future   ⋯

Purchase Orders ▾   Search (Alt+Q)   🔍   401.56 USD 🛒   ♡ 3   394 👤

Requisition • 150718510 ▾

Assign Cart   **Submit Requisition**

Summary   Taxes/S&H   PO Preview   **Comments**   Attachments   History

Records found: 0   Show comments for   Requisition ▾   +

No comments have been added

In order to add a **COMMENT**, click the [+] icon

Draft

Total (401.56 USD) ˅

Subtotal   401.56
Shipping   0.00
Handling   0.00
          401.56

What's next for my order? ˅

Next Step   Purchasing Buyer Review
Approvers   Alexander, Michelle
            Byrd, Donna
            James, Kevin

Workflow

⊡ 🖨

Show skipped steps

● **Draft**
   Active
   Kevin James

○ **Banner Budget Authorization**
   Future   ⋯

○ **Purchasing Buyer Review**
   Future   ⋯

○ **Special Approval**
   Future   ⋯

Purchase Orders ▾   Search (Alt+Q) 🔍   401.56 USD 🛒   ♡ ⌷³ 👤³⁹⁴

Requisition • 150718510 ▾

≡ 🖨 ❓   Assign Cart   **Submit Requisition**

Summary   Taxes/S&H   PO Preview   **Comments**   Attachments   History

---

Records found: 0   Show comments for [Requisition ▾] ⊕

ADD COMMENT	✓ ✕

This will add a comment to the document.

Attach file (optional)

Attachment Type   ● File   ○ Link/URL

File Name [   ]

File   [Choose File] [Upload your file   ]

1000 characters remaining   expand | clear

No comments have been added

Draft

Total (401.56 USD)   ⌄

Subtotal   401.56
Shipping   0.00
Handling   0.00
                            _____
                                  401.56

What's next for my order?   ⌄

Next Step   Purchasing Buyer Review

Approvers   Alexander, Michelle
                 Byrd, Donna
                 James, Kevin

Workflow   ↗ 🖨

⬤ Show skipped steps

📍 **Draft**
   Active
   Kevin James

○ **Banner Budget Authorization**   ⋯
   Future

○ **Purchasing Buyer Review**   ⋯
   Future

○ **Special Approval**   ⋯
   Future

Once you click the [+] icon, the above dialog box appears.

***From here, you can add **COMMENT** or **ATTACHMENT**

Purchase Orders ▼   Search (Alt+Q)   401.56 USD 🛒   ♡ **3**   **394** 👤

Requisition · 150718510 ▼   ☰ 🖶 ❓   Assign Cart   **Submit Requisition**

Summary   Taxes/S&H   PO Preview   Comments   Attachments   History

Records found: 0   Show comments for   Requisition ▼   ⊕

ADD COMMENT   ✓ ✕

These items are time-sensitive. Please review and approve accordingly.

929 characters remaining   expand | clear

This will add a comment to the document.

Attach file (optional)

Attachment Type   ⦿ File   ◯ Link/URL

File Name   [_____]

File   Choose File   Upload your file

No comments have been added

Draft

Total (401.56 USD) ⌄

Subtotal   401.56
Shipping   0.00
Handling   0.00

          401.56

What's next for my order? ⌄

Next Step   Purchasing Buyer Review

Approvers   Alexander, Michelle
          Byrd, Donna
          James, Kevin

Workflow   ⤢ 🖶

◯━ Show skipped steps

◉ **Draft**
   Active
   Kevin James

◯ **Banner Budget Authorization**   · · ·
   Future

◯ **Purchasing Buyer Review**   · · ·
   Future

◯ **Special Approval**   · · ·
   Future

Once you have entered your **COMMENT**, you will click the [✓] icon.

Purchase Orders ▾   Search (Alt+Q) 🔍   401.56 USD 🛒   ♡ |◉ 3   394 👤

Requisition · 150718510 ▾   ☰ 🖨 ❓ Assign Cart   Submit Requisition

Summary   Taxes/S&H   PO Preview   **Comments 1**   Attachments   History

Records found: 1   Show comments for   Requisition ▾ +

Kevin James - 11/8/2021 1:00:38 PM   Requisition - 150718510   Comment Added   ↩ 🗑

These items are time-sensitive. Please review and approve accordingly.

Here you can see that the **COMMENT** was successfully added.
COMMENTS trigger auto-generated **FYI** emails to approvers in the
workflow; the email will come from eprocurement@aucenter.edu

Draft

Total (401.56 USD)   ⌄

Subtotal   401.56
Shipping   0.00
Handling   0.00
                                                      _____
                                                       401.56

What's next for my order?   ⌄

Next Step   Purchasing Buyer Review

Approvers   Alexander, Michelle
                 Byrd, Donna
                 James, Kevin

Workflow   ⬀ 🖨

  ○── Show skipped steps

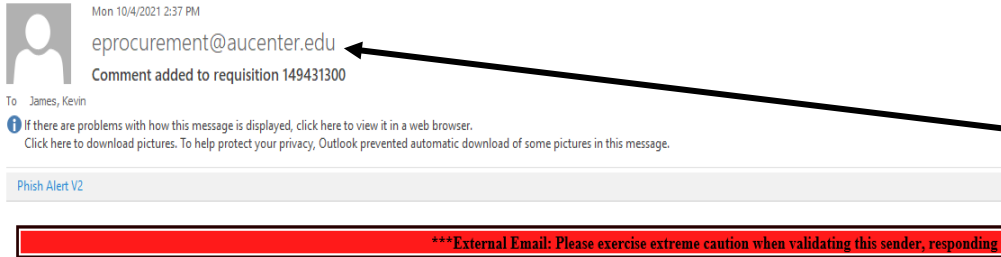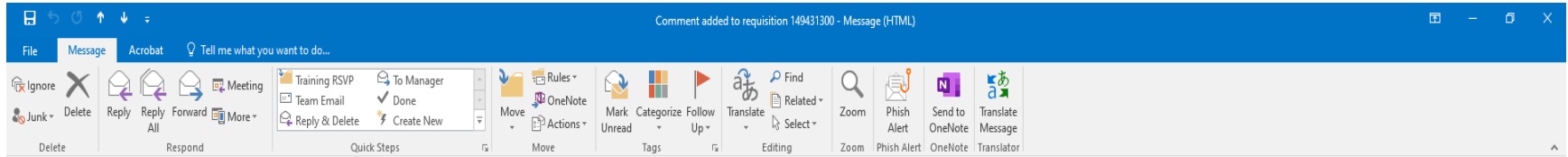 📍 Draft
     Active
     Kevin James

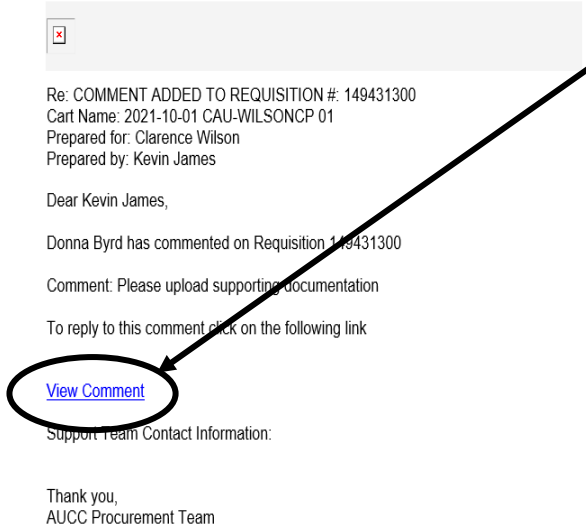 ○ Banner Budget Authorization   ...
     Future

  ○ Purchasing Buyer Review   ...
     Future

  ○ Special Approval   ...
     Future

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REPLIES to COMMENTS should always be made in Panther Buy

REPLIES can be made 2 ways:

- If you have the requisition number, can SEARCH for the
  requisition from the Panther Buy App Tray (icons next the right
  side of the screen)

    OR

- Via the automated Microsoft Outlook notifications from
  eprocurement@aucenter.edu **(STEPS BELOW)**

REPLYING TO A COMMENT

When **REPLYING TO A COMMENT** via automated email from eprocurement@aucenter.edu you will follow these steps:

Open the email and click **[VIEW COMMENT]**

Apps · home | Thank You P... · Banner 9

Other bookmarks · Reading list

+Q) · 401.56 USD · 3 · 394

Requisition · 149431300 ▾

Withdraw Entire Requisition

Summary · Taxes/S&H · PO Preview · Comments 4 · Attachments 2 · History

⚠ You are reviewing a requisition that has been resubmitted

Records found: 4

Show comments for · Requisition ▾ · +

Donna Byrd - 10/20/2021 11:12:06 AM · Requisition - 149431300 · Comment Added · ↩

Awaiting approver update

Email sent: Clarence Wilson <cwilson@cau.edu>

Attachment Added: ↓ Re Pending Orders Req. 149431300.msg

Kevin James - 10/4/2021 4:29:23 PM · Requisition - 149431300 · Comment Added · ↩ · 🗑

Supporting documentation has been added.

Email sent: Clarence Wilson <cwilson@cau.edu>, Donna Byrd <dbyrd@cau.edu>

Donna Byrd - 10/4/2021 2:36:36 PM · Requisition - 149431300 · Comment Added · ↩

Please upload supporting documentation

Email sent: Clarence Wilson <cwilson@cau.edu>, Kevin James <KJames@cau.edu>

Kevin James - 10/4/2021 2:12:17 PM · Requisition - 149431300 · Comment Added · ↩ · 🗑

Requisition needs approval from Dr. Rico Chapman and Dr. Chaudhary via the COMMENT SECTION.

Remove

Email sent: Clarence Wilson <cwilson@cau.edu>, Jaideep Chaudhary <jchaudhary@cau.edu>, Rico Chapman <rchapman@cau.edu>

158.90

What's next? ⌄

Workflow ⤢ 🖨

○ Show skipped steps

✓ **Submitted**
10/4/2021 2:09 PM
Kevin James
On behalf of: Clarence Wilson

✓ **Banner Budget Authorization**
Completed
System

✓ **Purchasing Buyer Review** ···
Approved
Donna Byrd

✓ **Special Approval** ···
Approved
Sytovia Dunn

◉ **Departmental Approval Level 1**
Active

○ **Banner Budget Authorization 2** ···
Future

○ **Create PO** ···
Future

○ **Finish** ···
Future

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Purchase Orders ▾   Search (Alt+Q)   401.56 USD 🛒   ♡ ⊫³   395 👤

Requisition • 149431300 ▾   ☰ 🖨 ❓ **Withdraw Entire Requisition**

Summary   Taxes/S&H   PO Preview   **Comments** ④   Attachments ②   History

⚠ You are reviewing a requisition that has been resubmitted

Records found: 4   Show comments for | Requisition ▾ | +

Donna Byrd - 10/20/2021 11:12:06 AM   Requisition - 149431300   Comment Added   ↩

Awaiting approver update

Email sent: Clarence Wilson <cwilson@cau.edu>

Attachment Added: ⬇ Re Pending Orders Req. 149431300.msg

Kevin James - 10/4/2021 4:29:23 PM   Requisition - 149431300   Comment Added   ↩ 🗑

Supporting documentation has been added.

Email sent: Clarence Wilson <cwilson@cau.edu>, Donna Byrd <dbyrd@cau.edu>

Donna Byrd - 10/4/2021 2:36:36 PM   Requisition - 149431300   Comment Added   ↩

Please upload supporting documentation

Email sent: Clarence Wilson <cwilson@cau.edu>, Kevin James <KJames@cau.edu>

Kevin James - 10/4/2021 2:12:17 PM   Requisition - 149431300   Comment Added   ↩ 🗑

Requisition needs approval from Dr. Rico Chapman and Dr. Chaudhary via the COMMENT SECTION.   [Reply To]

Email sent: Clarence Wilson <cwilson@cau.edu>, Jaideep Chaudhary <jchaudhary@cau.edu>, Rico Chapman <rchapman@cau.edu>

Once you find the **COMMENT**, click the [↩] icon

Pending

Total (158.90 USD)   ⌄

Subtotal   158.90
Shipping   0.00
Handling   0.00
                                    _____
                                         158.90

What's next?   ⌄

Workflow   ⬈ 🖨

⚪ Show skipped steps

✓ **Submitted**
   10/4/2021 2:09 PM
   Kevin James
   On behalf of: Clarence Wilson

✓ **Banner Budget Authorization**
   Completed   ⋯
   System

✓ **Purchasing Buyer Review**
   Approved   ⋯
   Donna Byrd

✓ **Special Approval**
   Approved   ⋯
   Sytovia Dunn

📍 **Departmental Approval Level 1**
   Active

After clicking the [↰] icon, the **REPLY TO** dialog box appears, and you simply enter your **REPLY.**

Just like COMMENTS, REPLIES trigger an auto-generated email [from eprocurement@aucenter.edu] that will be sent to all selected recipients.

You can **ADD A RECIPIENT** at this point.

Purchase Orders ▾   Search (Alt+Q)   401.56 USD 🛒   ♡ ₪³ 🔔 👤

Requisition • 149431300 ▾   ☰ 🖶 ❓ **Withdraw Entire Requisition**

Summary   Taxes/S&H   PO Preview   Comments ④   Attachments ②   History

⚠ You are reviewing a requisition that has been resubmitted

Records found: 4

REPLY TO Kevin James

1000 characters remaining   expand | clear

Donna Byrd - 10/20/2021 11:12:06 AM   Requisition – 149431300 Comment Added ↺

Awaiting approver update

Email sent: Clarence Wilson <cwilson@cau.edu>

Attachment Added: ↓ Re Pending Orders Req. 149431300.msg

User Search   ✕

Last Name ❓   [   ]

First Name ❓   [   ]

User Name ❓   [   ]

Email ❓   [   ]

Business Unit ❓   Clark Atlanta University (Clark Atlanta University)

Department ❓   [▾]

Role ❓   [▾]

Results Per Page   [10   ▾]

                              Search   **Close**

This wi...
added...

Email...

☐
☐
✓
☐

Attach...
Attach...
File Na...

File   Choose File   Upload your file

Here is an example of the
RECIPIENT search

Pending

Total (158.90 USD)   ∨

Subtotal   158.90
Shipping   0.00
                                           0.00
                                         58.90

What's next?   ∨

Workflow   ☐ 🖶

◯ Show skipped steps

✓ **Submitted**
   10/4/2021 2:09 PM
   Kevin James
   On behalf of: Clarence Wilson

✓ **Banner Budget Authorization**   ...
   Completed
   System

✓ **Purchasing Buyer Review**   ...
   Approved
   Donna Byrd

✓ **Special Approval**   ...
   Approved
   Sytovia Dunn

◉ **Departmental Approval Level 1**
   Active

Purchase Orders ▼   Search (Alt+Q)   401.56 USD 🛒 ♡

Requisition · 149431300 ▼

Summary   Taxes/S&H   PO Preview   Comments 4   Attachments 2   History

⚠ You are reviewing a requisition that has been resubmitted

Records found: 4

REPLY TO Kevin James

1000 characters remaining   expand | clear

Donna Byrd - 10/20/2021 11:12:06 AM   Requisition - 149431300   Comment Added   ↺

Awaiting approver update

Email sent: Clarence Wilson <cwilson@cau.edu>

Attachment Added: ↓ Re Pending Orders Req. 149431300.msg

User Search   X

Last Name ❓   chapman

First Name ❓   rico

User Name ❓

Email ❓

Business Unit ❓   Clark Atlanta University (Clark Atlanta University)

Department ❓   ▼

Role ❓   ▼

Results Per Page   10   ▼

                                    Search   Close

Type the name of the new recipient and click [SEARCH]

Pending

Total (158.90 USD)   ⌄

                                            90
                                            00
                                            00

                                            158.90

What's next?   ⌄

Workflow

⬤ Show skipped steps

✓ Submitted
  10/4/2021 2:09 PM
  Kevin James
  On behalf of: Clarence Wilson

✓ Banner Budget Authorization
  Completed
  System

✓ Purchasing Buyer Review
  Approved
  Donna Byrd

✓ Special Approval
  Approved
  Sytovia Dunn

◉ Departmental Approval Level 1
  Active

Purchase Orders ▾   Search (Alt+Q)   401.56 USD 🛒   ♡ 🏷 👤

User Search   X

New Search

Name ^	User Name	Email	Phone	Action
Chapman, Rico	CAU-CHAPMANR	rchapman@cau.edu		+

Close

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | Add recipient

☐ Clarence Wilson (Approved) <cwilson@cau.edu>

☐ Donna Byrd (Approved) <dbyrd@cau.edu>

✓ Kevin James (Prepared by, Approved) <KJames@cau.edu>

☐ Sytovia Dunn (Approved) <sdunn@cau.edu>

Attach file (optional)

Attachment Type   ● File   ○ Link/URL

File Name   [   ]

File   Choose File   Upload your file

1000 characters remaining   expand | clear

Find the name of the new RECIPIENT and click the [+] icon to add the user to your REPLY

What's Next?   ⌄

10/4/2021 2:09 PM
Kevin James
On behalf of: Clarence Wilson

Banner Budget Authorization
Completed
System

Purchasing Buyer Review
Approved
Donna Byrd

Special Approval
Approved
Sytovia Dunn

Donna Byrd - 10/20/2021 11:12:06 AM   Requisition - 149431300   Comment Added ↩

Awaiting approver update

Email sent: Clarence Wilson <cwilson@cau.edu>

Attachment Added: ⬇ Re Pending Orders Req. 149431300.msg

Departmental Approval Level 1
Active

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Purchase Orders ▼   Search (Alt+Q)   401.56 USD 🛒   ♡ |▮ 3   👤395

Requisition • 149431300 ▼   ☰ 🖨 ❓ **Withdraw Entire Requisition**

Summary   Taxes/S&H   PO Preview   Comments ④   Attachments ②   History

⚠ You are reviewing a requisition that has been resubmitted

Records found: 4   Show comments for | Requisition ▼ | +

REPLY TO Kevin James   ✓   ✕

1000 characters remaining   expand | clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | Add recipient

☐ Clarence Wilson (Approved) <cwilson@cau.edu>

☐ Donna Byrd (Approved) <dbyrd@cau.edu>

✓ Kevin James (Prepared by, Approved) <KJames@cau.edu>

☐ Sytovia Dunn (Approved) <sdunn@cau.edu>

✓ Chapman, Rico <rchapman@cau.edu>

Here you can see that the new recipient has been added.

Attach file (optional)

Attachment Type   ● File   ○ Link/URL

File Name   [   ]

File   [Choose File] [Upload your file]

Donna Byrd - 10/20/2021 11:12:06 AM   Requisition - 149431300   Comment Added   ↩

Awaiting approver update

Email sent: Clarence Wilson <cwilson@cau.edu>

Attachment Added: ⬇ Re Pending Orders Req. 149431300.msg

Pending

Total (158.90 USD)   ⌄

Subtotal   158.90
Shipping   0.00
Handling   0.00
                                          _____
                                                158.90

What's next?   ⌄

Workflow   ⬈ 🖨

○ Show skipped steps

✓ **Submitted**
   10/4/2021 2:09 PM
   Kevin James
   On behalf of: Clarence Wilson

✓ **Banner Budget Authorization**   •••
   Completed   [Banner Budget Authorization]
   System

✓ **Purchasing Buyer Review**   •••
   Approved
   Donna Byrd

✓ **Special Approval**   •••
   Approved
   Sytovia Dunn

📍 **Departmental Approval Level 1**
   Active

Purchase Orders ▼   Search (Alt+Q) 🔍   401.56 USD 🛒   ♡ | 🏷️ ③ | 🔔 ③⑨⑤ 👤

Requisition • 149431300 ▼   ☰ 🖨 ❓ **Withdraw Entire Requisition**

Summary   Taxes/S&H   PO Preview   Comments ④   Attachments ②   History

⚠️ You are reviewing a requisition that has been resubmitted

Pending

Records found: 4   Show comments for | Requisition ▾ | +

Total (158.90 USD) ⌄

REPLY TO Kevin James   ✓ ✕

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | Add recipient

☐ Clarence Wilson (Approved) <cwilson@cau.edu>

☐ Donna Byrd (Approved) <dbyrd@cau.edu>

✓ Kevin James (Prepared by, Approved) <KJames@cau.edu>

☐ Sytovia Dunn (Approved) <sdunn@cau.edu>

✓ Chapman, Rico <rchapman@cau.edu>

1000 characters remaining   expand |

Subtotal   158.90
Shipping   0.00
Handling   0.00
                      _____
                        158.90

What's next? ⌄

Workflow   ↗ 🖨

⬤ Show skipped steps

○ Submitted
   2:09 PM
   of: Clarence Wilson

Attach file (optional)

Attachment Type   ⬤ File   ○ Link/URL

File Name [   ]

File   **Choose File**   Upload your file

```
Finally:

• SELECT any other recipients
• Add your REPLY
• Click the [ ✓ ] icon
```

Budget Authorization   ...

✓ Purchasing Buyer Review   ...
   Approved
   Donna Byrd

Donna Byrd - 10/20/2021 11:12:06 AM   Requisition - 149431300 Comment Added ↩

Awaiting approver update

Email sent: Clarence Wilson <cwilson@cau.edu>

Attachment Added: ↓ Re Pending Orders Req. 149431300.msg

✓ Special Approval   ...
   Approved
   Sytovia Dunn

📍 Departmental Approval Level 1
   Active