

Non-Catalog Item Requisition Training Guide

“DOCUMENT TRACKING GUIDE”

(Revised, Nov. 2021)

*****THE STEPS IN THIS GUIDE CAN BE USED TO TRACK ANY DOCUMENT IN PANTHER BUY*****

[REQUISITIONS, PURCHASE ORDERS, RECEIPTS, INVOICES, PROCUREMENT REQUESTS]

When tracking a document in Panther Buy, you will start at the [SHOPPING DASHBOARD], go to the APP TRAY, and look for the [📁] icon



Shopping Dashboard

Simple Advanced

Search for products, vendor, forms, part number, etc.

Go to: Favorites | Forms | Non-Catalog Item | Quick Order | Browse: Vendor | Categories | Contracts | Chemicals

Organization Message

Procurement Services News & Information

Holiday Delivery Schedule

The COVID-19 Global Pandemic has had a substantial impact on supply chain and logistics (i.e. labor, dealer & wholesale shortages). With the holiday season quickly approaching and last minute shopping surges imminent, extended delivery times are also likely to occur.

In an effort to minimize the effects of the current logistical situation, please be advised that all requisitions must be in PantherBuy by close of business on **Monday, November 29th, 2021, and have an approved Panther Buy PO by Friday, December 3rd, 2021.** This will increase the likelihood that packages will be delivered and received prior to the holiday break.

If your requisition has not received an approved PO by **December 3rd, 2021,** it will be placed on **HOLD until after the Christmas break.**

Please contact the Purchasing Department, at Purchasing@cau.edu, should you have any questions.

Purchasing Policy Update

The standard vendor set-up processing time is 24-48 hours from the time the document is submitted to Purchasing. Please allow this processing period before inquiring about the status of your vendor. Vendor documents are approved when all vetting requirements are satisfied.

Please contact the Purchasing Department, at Purchasing@cau.edu, should you have any questions.

Thanks,

Clark Atlanta Procurement Services Team

Showcases

Scientific Vendors

 CAU	 Medical/ Clinical	 Santa Cruz Biotechnology	 Sigma Aldrich
 PunchOut			

Office Supplies Vendors

 PunchOut	 Amazon - CAU	 Office Depot
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Computer & Information Technology Vendors

Shop • Shopping Dashboard

Orders

Search

My Orders

Approvals

Quick search

My Requisitions

My Purchase Orders

My Invoices

My Receipts

My Procurement Requests

Choose one from the list

Hover over the [🔍] icon, then hover over [MY ORDERS]. From there you will be able to search for all of your **REQUISITIONS, PURCHASE ORDERS, INVOICES, RECEIPTS, and PROCUREMENT (NEW VENDOR) REQUESTS**

Hover over [My Orders]

Holiday Delivery Schedule

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Showcases

Scientific Vendors

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 PunchOut			

Office Supplies Vendors

 PunchOut	 Amazon - CAU	 Office Depot
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Computer & Information Technology Vendors

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You can use [QUICK FILTERS], located here, to search by VENDOR, REQUISITION STATUS, APPROVER, ETC.

In order to search by any of the [QUICK FILTERS], simply click on the filter. For example, if you are looking for requisitions submitted for "VWR" purchases, you would click "VWR" in the [QUICK FILTERS] column.

My Requisitions (Modified)

- Quick Filters**
- Vendor**
 - Office Depot
 - VWR International
 - Quadient Leasing USA Inc
 - Amazon.com (Alt)
 - Sodexo, Inc. Affiliates Campus Services
 - See More
- Requisition Status**
 - Completed
 - Withdrawn
 - Show More
- Business Unit**
 - Clark Atlanta University (Clark Atlanta University)
 - Show More
- Prepared By**
 - James, Kevin
 - Moore, Minnie
 - Show More
- Approved By**
 - rd, Donna
 - Han, Chasdity
 - Alexander, Michelle
 - Dunn, Sytovia

Submitted Date: All Quick search

Prepared For: James, Kevin

1-11 of 11 Results

Requisition Number	Vendor	Submitted Date	Total Amount
141863683	Amazon.com (Alt)	9/2021 4:37:29 PM	175.98 USD
130371568	VWR International	2020-03-05 CAU-JAMESKJ 01	Withdrawn
138266247	Quadient Leasing USA Inc	2020-11-20 CAU-JAMESKJ 01	Completed
133688570	National Association of Educational Procurement	2020-07-13 CAU-JAMESKJ 01	Completed
128549636	Neopost USA d/b/a Neopost Southeast	2020-01-27 CAU-JAMESKJ 01	Completed
126229118	B-World Entertainment	2019-11-20 CAU-JAMESKJ 01	Completed
126137295	American Systems, Inc., d/b/a Simon Sign Systems	2019-11-19 CAU-JAMESKJ 03	Completed
126136156	Office Depot	2019-11-19 CAU-JAMESKJ 02	Completed
126118790	Sodexo, Inc. Affiliates Campus Services	2019-11-19 CAU-JAMESKJ 01	Completed
125647843	Office Depot	2019-11-07 CAU-JAMESKJ 03	Completed
125387959	Office Depot	2019-11-01 CAU-JAMESKJ 01	Completed

1-11 of 11 Results

From here you can add a [DATE FILTER], which will allow you to search between a specific date range.

My Requisitions (Modified)

Save As | Pin Filters | Export All

Quick Filters | My Searches

Submitted Date: All | Quick search | Add Filter | Clear All Filters

Vendor

- Office Depot (3)
- VWR International (1)
- Quadient Leasing USA Inc (1)
- Amazon.com (Alt) (1)
- Sodexo, Inc. Affiliates Campus Services (1)
- See More | Show More

Requisition Status

- Completed (10)
- Withdrawn (1)
- Show More

Business Unit

- Clark Atlanta University (Clark Atlanta University) (11)

Prepared By

- James, Kevin (10)
- Moore, Minnie (1)
- Show More

Approved By

- Byrd, Donna (10)
- Harris, Chasdity (3)
- Alexander, Michelle (2)
- Dunn, Sytovia (2)

All

Within Last 7 days

Between [] and []

[more options >](#)

	Requisition Name	Requisition Status	Prepared For	Submitted Date	Total Amount
<input type="checkbox"/>	2021-03-16 CAU-JAMESKJ 01	Completed	Kevin James	4/29/2021 4:37:29 PM	175.98 USD
<input type="checkbox"/>	2020-03-05 CAU-JAMESKJ 01	Withdrawn	Kevin James	1/14/2021 10:42:34 AM	0.00 USD
<input type="checkbox"/>	138266247 Quadient Leasing USA Inc	Completed	Kevin James	11/20/2020 1:44:24 PM	6,576.00 USD
<input type="checkbox"/>	133688570 National Association of Educational Procurement	Completed	Kevin James	7/24/2020 2:15:12 PM	661.50 USD
<input type="checkbox"/>	128549636 Neopost USA d/b/a Neopost Southeast	Completed	Kevin James	2/6/2020 12:35:30 PM	3,796.00 USD
<input type="checkbox"/>	126229118 B-World Entertainment	Completed	Kevin James	11/21/2019 9:16:14 AM	2,100.00 USD
<input type="checkbox"/>	126137295 American Systems, Inc., d/b/a Simon Sign Systems	Completed	Kevin James	11/19/2019 12:16:53 PM	605.00 USD
<input type="checkbox"/>	126136156 Office Depot	Completed	Kevin James	11/19/2019 12:10:38 PM	194.84 USD
<input type="checkbox"/>	126118790 Sodexo, Inc. Affiliates Campus Services	Completed	Kevin James	11/19/2019 11:20:21 AM	171.50 USD
<input type="checkbox"/>	125647843 Office Depot	Completed	Kevin James	11/7/2019 12:24:05 PM	145.95 USD
<input type="checkbox"/>	125387959 Office Depot	Completed	Kevin James	11/6/2019 4:49:57 PM	426.12 USD

1-11 of 11 Results

200 Per Page

My Requisitions (Modified)

Save As Pin Filters Export All

Quick Filters My Searches

Vendor

- Office Depot 3
- VWR International 1
- Quadient Leasing USA Inc 1
- Amazon.com (Alt) 1
- Sodexo, Inc. Affiliates Campus Services 1
- See More Show More

Requisition Status

- Completed 10
- Withdrawn 1
- Show More

Business Unit

- Clark Atlanta University (Clark Atlanta University) 11

Prepared By

- James, Kevin 10
- Moore, Minnie 1
- Show More

Approved By

- Byrd, Donna 10
- Harris, Chasdity 3
- Alexander, Michelle 2
- Dunn, Sytovia 2

Submitter Date: All Quick search

Within

Between

More options >

Days

- Last 7 days
- Last 30 days
- Last 60 days
- Last 90 days
- Last 120 days
- Last 180 days
- Last Week
- This Week
- Yesterday

Calendar

- Month-To-Date
- Year-To-Date
- Last Month
- Previous Year

Fiscal

- Fiscal Year-To-Date
- Previous Fiscal Year

Cancel

Here is an example of some of the options available when using the [DATE FILTER]

Submitted Date	Total Amount
2021-03-16 CAU-JAMESKJ 01	Completed Kevin James 4/29/2021 4:37:29 PM 175.98 USD
2020-03-05 CAU-JAMESKJ 01	Withdrawn Kevin James 1/14/2021 10:42:34 AM 0.00 USD
2020-11-20 CAU-JAMESKJ 01	Completed Kevin James 11/20/2020 1:44:24 PM 6,576.00 USD
2020-07-13 CAU-JAMESKJ 01	Completed Kevin James 7/24/2020 2:15:12 PM 661.50 USD
2020-01-27 CAU-JAMESKJ 01	Completed Kevin James 2/6/2020 12:35:30 PM 3,796.00 USD
2019-11-20 CAU-JAMESKJ 01	Completed Kevin James 11/21/2019 9:16:14 AM 2,100.00 USD
2019-11-19 CAU-JAMESKJ 03	Completed Kevin James 11/19/2019 12:16:53 PM 605.00 USD
2019-11-19 CAU-JAMESKJ 02	Completed Kevin James 11/19/2019 12:10:38 PM 194.84 USD
2019-11-19 CAU-JAMESKJ 01	Completed Kevin James 11/19/2019 11:20:21 AM 171.50 USD
2019-11-07 CAU-JAMESKJ 03	Completed Kevin James 11/7/2019 12:24:05 PM 145.95 USD
2019-11-01 CAU-JAMESKJ 01	Completed Kevin James 11/6/2019 4:49:57 PM 426.12 USD

1-11 of 11 Results

200 Per Page

Vendor

- Office Depot (59)
- Amazon.com (Alt) (54)
- VWR International (49)
- Sodexo, Inc. Affiliates Campus Services (29)
- Staples Business Advantage (25)
- See More Show More

Business Unit

- Clark Atlanta University (Clark Atlanta University) (798)

Order Owners

- Ingram, Annette (62)
- Gray Thompson, Valerie (62)
- Blow, Myra (60)
- Montgomery, Tiffany (46)
- Ware, Debra (39)
- See More Show More

Approved By

- Byrd, Donna (372)
- Satchell, Kenya (243)
- Harris, Chasdity (239)
- Alexander, Michelle (202)
- James, Kevin (202)
- See More Show More

<input type="checkbox"/>	150828819	Requisition	Pending	Maria Henry	11/5/2021 11:12:08 AM	- Sodexo, Inc. Affiliates Campus Services ⓘ	489.00 USD
<input type="checkbox"/>	150826196	Requisition	Pending	Joyce Outler	11/5/2021 10:41:00 AM	- Amazon.com (Alt) ⓘ	393.03 USD
<input type="checkbox"/>	150826147	Requisition	Pending	Diamond Mason	11/5/2021 10:40:01 AM	- The Mass Collective, LLC ⓘ	300.00 USD
<input type="checkbox"/>	150809709	Requisition	Complete	Indika Matarai KanKanangme	11/4/2021 5:27:56 PM	11/5/2021 1:04:56 PM MTI Corporation ⓘ	4,795.29 USD
<input type="checkbox"/>	150806911	Requisition	Complete	Randle Cameron	11/4/2021 4:44:28 PM	11/5/2021 11:30:24 AM Amazon.com (Alt) ⓘ	999.00 USD
<input type="checkbox"/>	150805962	Requisition	Pending	Myra Blow	11/4/2021 4:33:07 PM	- Jericho Broadcast Networks, Inc. ⓘ	1,200.00 USD
<input type="checkbox"/>	150805768	Requisition	Pending	Myra Blow	11/4/2021 4:29:03 PM	- Sodexo, Inc. Affiliates Campus Services ⓘ	911.75 USD
<input type="checkbox"/>	150805182	Requisition	Pending	Myra Blow	11/4/2021 4:22:57 PM	- Cascade Overlook, Inc. ⓘ	146.25 USD
<input type="checkbox"/>	150804687	Requisition	Pending	Natalie Baker	11/4/2021 4:16:59 PM	- Staples Business Advantage ⓘ	954.56 USD
<input type="checkbox"/>	150802610	Requisition	Pending	Myra Blow	11/4/2021 3:54:24 PM	- Oscar Daniel ⓘ	1,950.00 USD
<input type="checkbox"/>	150801859	Requisition	Pending		3:33 PM	- Varsity Brands Holding Co, Inc. ⓘ	1,732.50 USD
<input type="checkbox"/>	150798847	Requisition	Pending		1:19 PM	- Amazon.com (Alt) ⓘ	15.50 USD
<input type="checkbox"/>	150797769	Requisition	Pending		1:54 PM	- Amazon.com (Alt) ⓘ	224.99 USD
<input type="checkbox"/>	150795782	Requisition	Pending	Sabrina Guillaume	11/4/2021 2:47:43 PM	- Office Depot ⓘ	383.65 USD
<input type="checkbox"/>	150795949	Requisition	Pending	Geou-Yarh Liou Valerie Gray Thompson	11/4/2021 2:47:29 PM	- Bio-Rad Laboratories, Inc. ⓘ	470.60 USD
<input type="checkbox"/>	150795892	Requisition	Returned	Indika Matarai KanKanangme	11/4/2021 2:47:13 PM	- Amazon.com (Alt) ⓘ	444.98 USD
<input type="checkbox"/>	150777270	Requisition	Pending	Chasdity Harris	11/4/2021 11:40:38 AM	- Sodexo, Inc. Affiliates Campus Services ⓘ	1,583.75 USD
<input type="checkbox"/>	150772074	Requisition	Returned	Myra Blow	11/4/2021 11:00:56 AM	- Follett Higher Education Group ⓘ	252.00 USD

When you find the requisition that you are looking for, simply click the [REQUISITION NUMBER]. This will take you to the requisition [SUMMARY] page.

Requisition • 150802610

START HERE

Now that you have reached the requisition [SUMMARY] page, you can (a) **REVIEW THE WORKFLOW** or (b) **REVIEW THE HISTORY**. It is advised that you start by reviewing the workflow then move to the history.

SPECIAL NOTES:

- Purchasing has a 48 hour review/processing/approval time. Once it is reviewed, processed, and approved a requisition moves forward and Purchasing has limited access to make changes or modifications.
- Each department has their own process for approval, so it is important that you contact that department for details on their process [SEE TRAINING GUIDE FOR 'COMMENTS'].

The [HISTORY] tab will provide details related to any changes made to the document and provides a time stamp for when the changes were made. From this tab, you can determine how long a requisition was [IN PROCESS] for any area

The requisition's **WORKFLOW** will tell you where [WHAT AREA] your requisition is in and who are the approvers for that area.

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

Prepared by Myra Blow

PO Clauses [7 Edit | View details](#)

Executive Orders *no value*

Standing Order

Atlanta, GA 30314 United States

Delivery Expedite

Shipping 0.00

Handling 0.00

1,950.00

Activity *no value*

What's next?

Workflow

- Show skipped steps
- Submitted 11/4/2021 4:01 PM Myra Blow
- Banner Budget Authorization Completed System
- Purchasing Buyer Review Approved Donna Byrd
- Special Approval Active Chasidity Harris
- Departmental Approval Level 1 Future

↓ Oscar D. CAU Fall Sports Invoice 2021.xlsx 11/4/2021

22 Items

Oscar Daniel · 22 Items · 1,950.00 USD

^ VENDOR DETAILS CAU-PO Purchase Order 2 : Db a Oscar Daniel Phot...

Contract *no value* PO Number To Be Assigned

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
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