

# Panther Buy Training Guide

## “APPROVING A REQUISITION”

(Revised, Nov. 2021)



Action Items

## Shop • Shopping Dashboard

### Shop

Simple Advanced

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

From the Panther Buy Shopping Dashboard:

CLICK the [🔔] icon, this opens **ACTION ITEMS**

### 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 29<sup>th</sup>, 2021, and have an approved Panther Buy PO by Friday, December 3<sup>rd</sup>, 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 3<sup>rd</sup>, 2021,** it will be placed on **HOLD until after the Christmas break.**

Please contact the Purchasing Department, at [Purchasing@cau.edu](mailto: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](mailto:Purchasing@cau.edu), should you have any questions.

Thanks,

Clark Atlanta Procurement Services Team

### Showcases

#### Scientific Vendors

Fisher Scientific CAU	HENRY SCHEIN Medical/ Clinical	Santa Cruz Biotechnology	MILLIPORE SIGMA Sigma Aldrich
VWR We enable Science PunchOut			

#### Office Supplies Vendors

STAPLES PunchOut	amazon Amazon - CAU	Office DEPOT Office Depot
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#### Computer & Information Technology Vendors

### Shop • Shopping Dashboard

### Shop

Simple Advanced

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

### Action Items

- My Assigned Approvals
- Carts Assigned To Me
- Requisitions To Approve
- Unassigned Approvals
- Requisitions

Under **ACTION ITEMS**:  
Click one (1) of the following:  
**REQUISITION TO APPROVE**: To view requisitions already assigned to you  
**UNASSIGNED APPROVALS**: To view requisitions that need to be assigned for approval  
**\*\*\*NOTE: Requisitions MUST be assigned before approval can be given**

### Organization Message

#### Procurement Holiday D

The COVID-19 holiday season is upon us. In an effort to close of business and increase the

If your requisition has not received an approved PO by December 31<sup>st</sup>, 2021, it will be placed on HOLD until after the Christmas break. Please contact the Purchasing Department, at [Purchasing@cau.edu](mailto: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](mailto:Purchasing@cau.edu), should you have any questions.

Thanks,

Clark Atlanta Procurement Services Team

### Vendors

Fisher Scientific CAU	HENRY SCHENK Medical/ Clinical	Santa Cruz Biotechnology	MILLIPORE SIGMA-Sigma-Aldrich
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PunchOut
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### Office Supplies Vendors

STAPLES PunchOut	amazon Amazon - CAU	Office DEPOT Office Depot
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### Computer & Information Technology Vendors

# Approvals



Submit Date Newest First ▾

- Requisitions
- Purchase Order
- Procurement Requests
- AP Requests

## Your Selections

### Date Range

All Dates

Assigned Approver • Kevin James ✕

## Filters

### ^ VENDOR

Techbirds Innovations, Inc. 2

### ^ DEPARTMENT

Computer and Information Sciences (BS) (30535) 2

### ^ BUSINESS UNIT

Clark Atlanta University (Clark Atlanta University) 2

### ^ CURRENT WORKFLOW STEP

Purchasing Buyer Review 1

### ^ PREPARED FOR

Crystal McKnight 2

### ^ PREPARED BY

Crystal McKnight 2

### ^ STATUS FLAGS

Total Results 1 Display 20 per folder ▾

> MY PR APPROVALS 1

or

> PURCHASING REVIEW - CAU 1

**CLICK TO EXPAND**



# Approvals

Submit Date Newest First ▾

Requisitions | Purchase Order | Procurement Requests | AP Requests

## Your Selections

### Date Range

All Dates ▾

Assigned Approver • Kevin James X

## Filters

### ^ VENDOR

Techbirds Innovations, Inc. 2

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Crystal McKnight 2

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Crystal McKnight 2

### ^ STATUS FLAGS

Total Results 1

Display 20 per folder ▾

> MY PR APPROVALS 1

▾ PURCHASING REVIEW - CAU 1

REQUISITION NO.	VENDOR	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT	
<a href="#">150940059</a>	Techbirds Innovations, Inc.	Kevin James	11/9/2021 3:50 PM	Crystal McKnight	9,750.00 USD	[Edit] [Quick View] [Assign]
Requisition Name		2021-11-09 CAU-MCKNIGHTC 01	Folders	5 Days in folder [My PR Approvals]		
No. of line items				5 Days in folder [Purchasing Review - CAU]		

Once the folder has been expanded, the requisitions numbers will appear

- Click the Requisition number to be transferred to the **REQUISITION SUMMARY**
- Click [  ] to view the requisition's **ATTACHMENTS**
- Click [  ] for a **QUICK VIEW** of the requisition
- Click [  ] to **ASSIGN** the requisition

Requisition • 151008633

Summary Taxes/S&H PO Preview Comments Attachments

You are reviewing a requisition that has been resubmitted

General

Status Pending Purchasing Buyer Review (Kevin James)

Submitted 11/11/2021 4:08 PM

Description no value

Prepared by Sabrina Guillaume

PO Clauses 7 Edit | View details

Executive Orders no value

Standing Order X

Shipping

Ship To

Contact Line 1 Sabrina Guillaume Mailroom Bishop Cornelius 223 James P Brawley Dr SW Atlanta, Georgia 30314 United States

Bill To

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

Delivery

Expedite X Ship Via Best Carrier-Best Way

Billing Options

Accounting Date no value

Accounting Codes

Values vary by line. Copy to other lines

Chart	Fund	Organization	Account	Program	Activity
C Clark Atlanta University	110000-CAU Current Unrestricted Operations	30534-CAU Mathematics Department	7110-CAU Office Supplies	10-CAU Instruction	no value

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

On the SUMMARY page Click the drop down arrow to open the APPROVAL OPTIONS

Pending

Total (333.51 USD)	
Subtotal	333.51
Shipping	0.00
Handling	0.00
	333.51

What's next?

Workflow

Show skipped steps

Submitted 11/11/2021 4:08 PM Sabrina Guillaume

Banner Budget Authorization Completed System

Purchasing Buyer Review Active Kevin James

Special Approval Future

Departmental Approval Level 1 Future

Requisition • 151008633

Summary Taxes/S&H PO

- Approve & Next
- Approve
- Return to Shared Folder
- Place on Hold
- Return to Requisitioner
- Forward to ...
- Copy to New Cart
- Add Comment
- Add Notes to History
- Reject Requisition

**You are reviewing a requisition**

**General**

Status: Purch  
 Submitted: 11/11  
 Description: no va  
 Prepared by: Sabri  
 PO Clauses: Edit | View details

**Billing**

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

**Billing**

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

**Pending**

<b>Total (333.51 USD)</b>	
Subtotal	333.51
Shipping	0.00
Handling	0.00
	<b>333.51</b>

**What's next?**

Workflow

- **APPROVE & NEXT or APPROVE:** You have reviewed the requisition fully [SUMMARY PAGE, FOAP Information, COMMENTS, ATTACHMENTS, etc.] and sign-off on it
- **RETURN TO SHARED FOLDER:** If you inadvertently choose a requisition that DOES NOT require your approval, but that of a different approver (**rarely used outside of PURCHASING, SPECIAL APPROVAL (BUDGET OFFICE), RSP, and TITLE III- all of these offices have multiple approvers**)
- **PLACE ON HOLD:** More information is needed before an approval can be given (additional documentation, justification, review, or approval is needed; the additional information is added via the COMMENTS section-**SEE THE COMMENTS TRAINING GUIDE**)
- **RETURN TO REQUISITIONER:** When changes are required for the entire requisition; when changes are required that should only be completed by the requester i.e. changes to the FOAP, removal of items, etc.
- **FORWARD TO...:** Used to send the requisition to another Panther Buy user. **CAUTION-**As an APPROVER, when you forward a requisition to someone you are essentially giving them signing authority on your behalf. In other words, they become your “proxy”
- **REJECT REQUISITION:** You have reviewed the requisition fully and are unwilling to sign-off on it. Requisitions that have been rejected can no longer be edited or resubmitted by the requester; a new request will need to be generated.