Reviewing History

This section of the manual focuses on reviewing historical data from TechBUY. Shoppers and Requestors can review the details of each requisition they have placed/approved. Departmental Approvers can review orders for their department.

**Reviewing My Requisitions**

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

Submitted requisitions are all shown in one convenient place - My Requisitions. The progress of the requisition can easily be tracked from this folder. Once the requisitions have been completed, they can be removed from the My Requisitions list. They are still viewable through PR History (discussed later in this chapter.)

You can access the My Requisitions folder; select the History tab and the My Requisitions sub tab.
A table will display with the following details: Status, Requisition Number, Requisition Date, and Requisition Total.

Each column can be used to sort the table by selecting the small white triangle in the column header. The table is sorted by default on the **Requisition Date/Time** column.

<table>
<thead>
<tr>
<th>Status</th>
<th>Requisition No.</th>
<th>Requisition Name</th>
<th>Requisition Date/Time</th>
<th>Requisition Total</th>
<th>Remove Notification</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>172356</td>
<td>2000-01-05 dndyrequestor 01</td>
<td>1/5/2008 6:56 PM</td>
<td>5,165.00 USD</td>
<td>Remove</td>
</tr>
<tr>
<td>✔</td>
<td>172355</td>
<td>2000-01-05 dndyrequestor 01</td>
<td>1/5/2008 6:59 PM</td>
<td>5,399.00 USD</td>
<td>Remove</td>
</tr>
<tr>
<td>✔</td>
<td>172354</td>
<td>2000-01-05 dndyrequestor 01</td>
<td>1/5/2008 6:16 PM</td>
<td>755.00 USD</td>
<td>Remove</td>
</tr>
<tr>
<td>✗</td>
<td>172353</td>
<td>2000-01-05 dndyrequestor 01</td>
<td>1/5/2008 6:12 PM</td>
<td>0.00 USD</td>
<td>Remove</td>
</tr>
<tr>
<td>✗</td>
<td>172352</td>
<td>2000-01-05 dndyrequestor 01</td>
<td>1/5/2008 6:09 PM</td>
<td>0.00 USD</td>
<td>Remove</td>
</tr>
<tr>
<td>✗</td>
<td>172351</td>
<td>2000-01-05 dndyrequestor 01</td>
<td>1/5/2008 3:46 PM</td>
<td>0.00 USD</td>
<td>Remove</td>
</tr>
<tr>
<td>✔</td>
<td>172317</td>
<td>2000-01-04 dndyrequestor 01</td>
<td>1/5/2008 3:20 PM</td>
<td>5,140.00 USD</td>
<td>Remove</td>
</tr>
</tbody>
</table>

A **Status** dropdown is displayed at the top of the table header. It can be used to view requisitions in a specific status such as **Pending** or **Rejected**. By default, **All** requisitions are displayed in the table.

The last column in the table is **Remove Notification**. In this column, a **Remove** icon is displayed for each requisition. When clicked, the requisition is removed from the list and will not appear in the **My Requisition** screen anymore. Requisitions can be accessed at any time by searching in the **History** tab (addressed later in this chapter).

Click on the **Requisition No.** to access details about a specific requisition.
This will open the requisition and allow you to review all information within the requisition.

**PR History**

Purchase Requisitions generated in the application can be located using requisition name and requisition number as search criteria. A single purchase requisition or a group of requisitions can be retrieved based on the criteria entered.

Access the **PR History** sub-tab from the **History** tab. This section will walk you through querying for requisitions using the **By Requisition** sub-tab. However, if you have a PO number and would like to find the associated requisition, use the **By PO No.** sub-tab and follow the below instructions.
From this screen, numerous searches can be executed.

If you know the Requisition Name, Requisition No. Supplier Name, or Catalog No. (SKU), enter it in the search criteria fields on the top portion of the screen.

If you would like to search by Date, User, Department, Status etc, select the **Filter** box and enter the criteria in the lower portion of the screen.
Select the **Search** icon. The **PR Search Results** will display. The screen will mirror the **My Requisition** screen discussed in the section above. However, there are additional functionalities.

- You can select **New Search** to go back to the search interface and perform a search with different criteria.
- Select the **Save Query** to save the search criteria entered. You will be asked to provide a title for the query and a description. This enables you to easily rerun queries and avoid reentering the search criteria.
- Select the **Select Query** icon to run a previously saved query. Once the criteria is loaded, you can alter the criteria if necessary prior to running the saved query.
Reviewing My Purchase Orders

Purchase Order history contains details about the purchase order process, including the items ordered and the associated requisition(s). Additionally, information about order distribution is provided, including when the order was sent to the suppliers.

To access the My Purchase Orders folder, select the History tab and the My Purchase Orders sub tab.
A table will display with the following details: Workflow Status, PO Number, Supplier, Creation Date/Time, and PO Total.

Each column can be used to sort the table by selecting the small white triangle in the column header. The table is sorted by default on the **Requisition Date/Time** column.

A **Status** dropdown is displayed at the top of the table header. It can be used to view purchase orders in a specific status such as **Pending** or **Rejected**. By default, **All POs** are displayed in the table.

The last column in the table is **Remove Notification**. In this column, a **Remove** icon is displayed for each purchase order. When selected, the PO is removed from the list and will not appear in the **My Purchase Order** screen anymore. POs can be accessed at any time by searching in the **History** tab (addressed later in this chapter).

Click on the **PO No.** to access details about a specific purchase order.

This will open the purchase order and allow you to review all information within the PO.
Purchase Orders generated in TechBUY can be located using various PO details. A single purchase order or a group of purchase orders can be retrieved based on the criteria entered.

Access the PR History sub tab from the History tab. This section will walk you through querying for POs using the By Requisition sub tab. However, you can use the By PO No, By Supplier, or By Invoice tabs if you would like to search with that information. The functionality is the same for each tab, only the search criteria are different.

From this screen, numerous searches can be executed.

If you know the Requisition Name, Requisition No. Supplier Name, or Catalog No (SKU), enter it in the search criteria fields on the top portion of the screen.
If you would like to search by PO Date, Date Range, User, Department, Status etc, select the Filter box and enter the criteria in the lower portion of the screen.

Select the Search icon. The PO Search Results will display. The screen will mirror the My Purchase Order screen discussed in the section above. However, there are additional functionalities.

- You can select New Search to go back to the search interface and perform a search with different criteria.
• Select the **Save Query** to save the search criteria entered. You will be asked to provide a title for the query and a description. This enables you to easily rerun queries and avoid reentering the search criteria.

• Select the **Select Query** icon to run a previously saved query. Once the criteria is loaded, you can alter the criteria if necessary prior to running the saved query.