



Purchase Order: Display

Use this Job Aid to:

- Learn how to display a Purchase Order

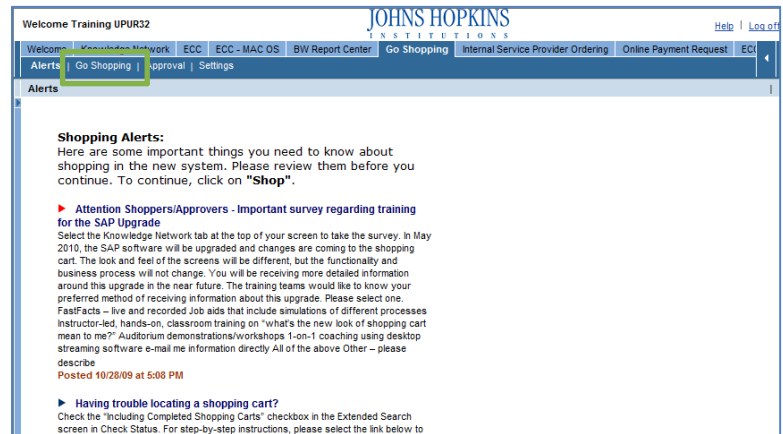
BEFORE YOU BEGIN

You need to have identifying information for the order (the Shopping Cart number, vendor, and/or date, etc).

Display a Purchase Order

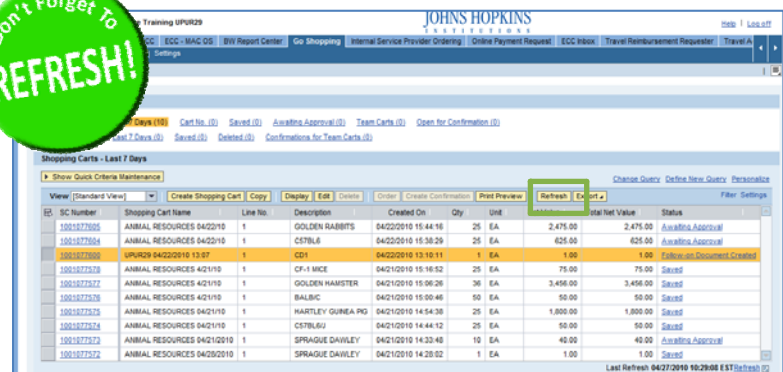
Perform this procedure when displaying information relating to the details and status of a purchase order is required.

1. **Select “Go Shopping.”** After you select the “Go Shopping” tab from the top line, select “Go Shopping” again from the next line to access the Shopping Cart Home Page.



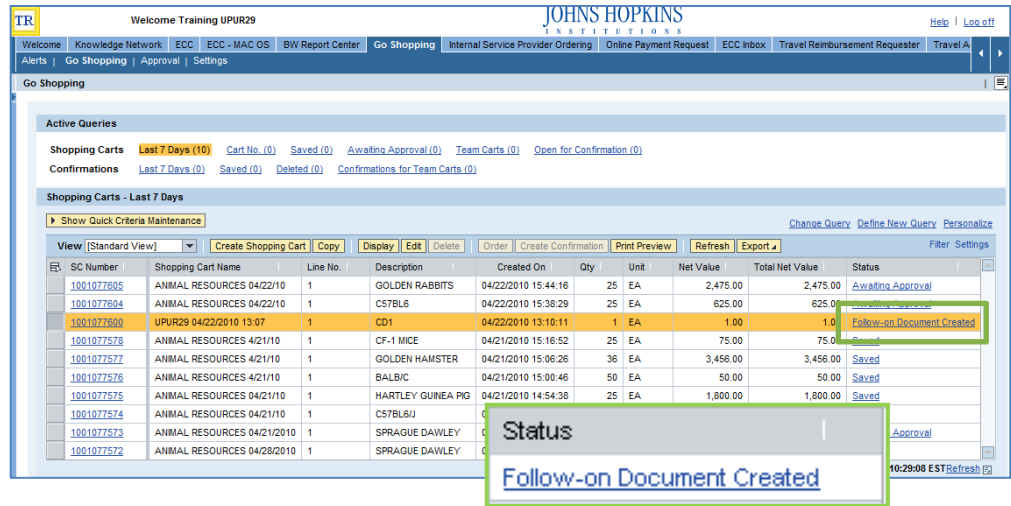
2. **Refresh.** At the Shopping Cart Home Page, click “Refresh” to make sure that you are viewing the most up-to-date information.

- Your most recent work will not appear until you have clicked “Refresh.”



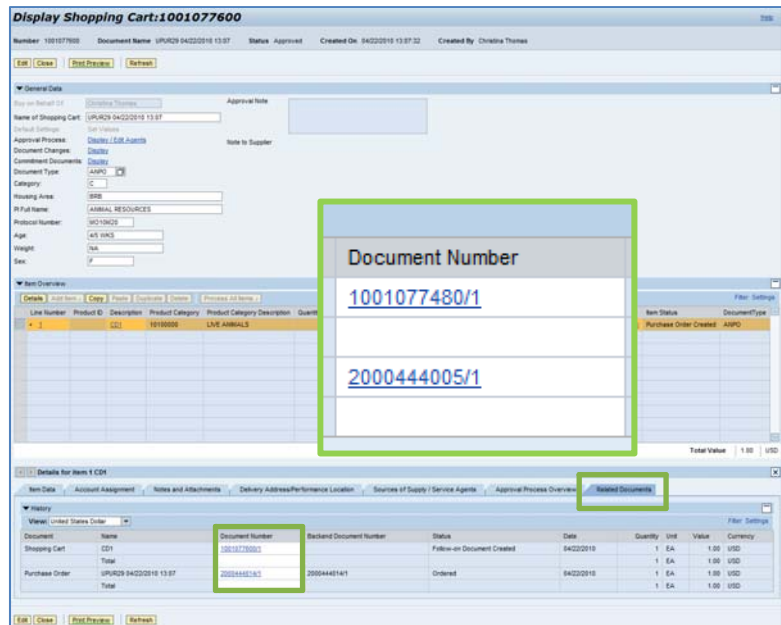
3. Locate the Order. The Shopping Cart Home Page displays a list of shopping carts, along with the status of each as shown in the right-most column labeled "Status."

- A Shopping Cart that has an associated Purchase Order will have the status **"Follow-On Document Created."**
- To access the Purchase Order, click on the "Follow-On Document Created" link. This displays the shopping cart (as if you had selected "Display" or "Edit"), but defaults to the tab called "Related Documents" in the "Details" section of the order.



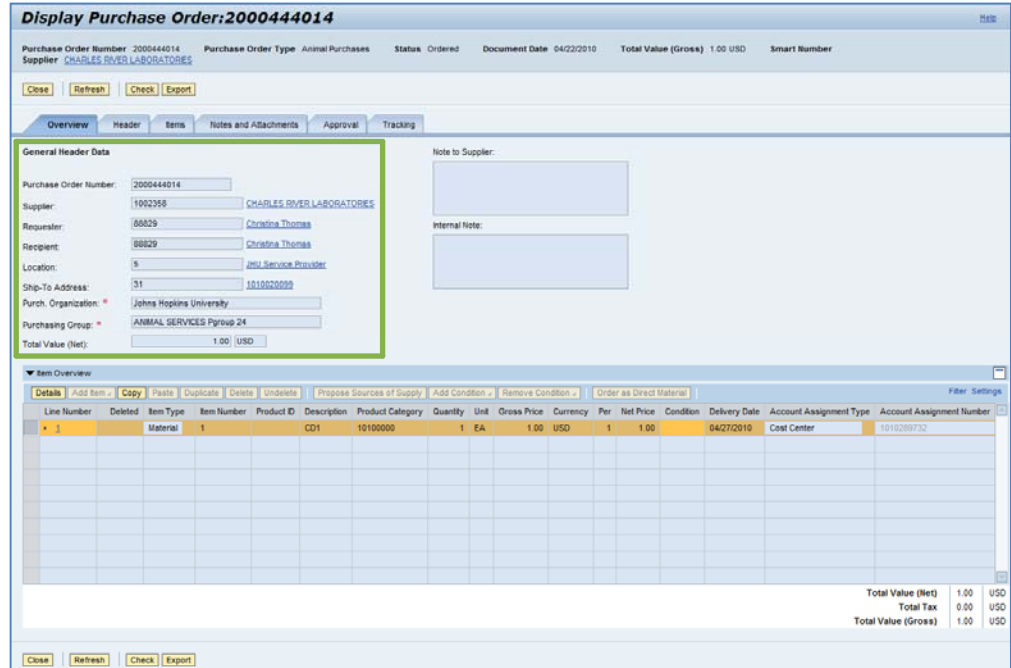
4. Locate the Follow-On Documents. Notice that the "Related Documents" tab is open when you arrive at the shopping cart screen. You can see the Shopping Cart and Purchase Order numbers in this area.

- The Shopping Cart Number is shown in the first line and always starts with a "1."
- The Purchase Order Number is shown in the second line and always starts with a "2." You may click on the Purchase Order Number to view the details of the order.
- To view the Purchase Order, click on the PO Number.

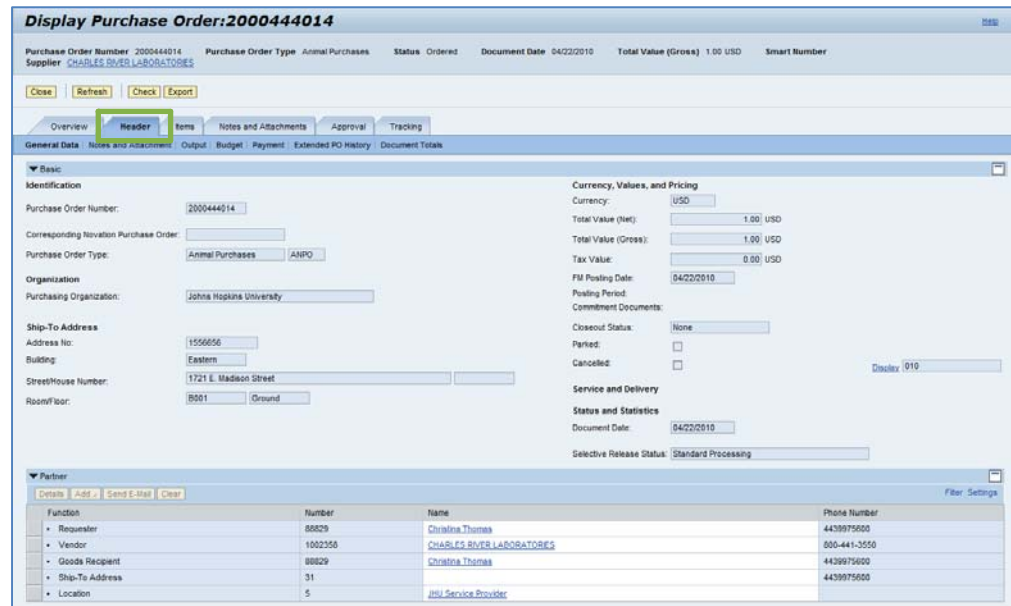


5. **View the Purchase Order.** The “Display Purchase Order” screen will appear. This screen tells the current status of the items ordered on the PO. Note that there are no receipts or invoices applied at this point in time.

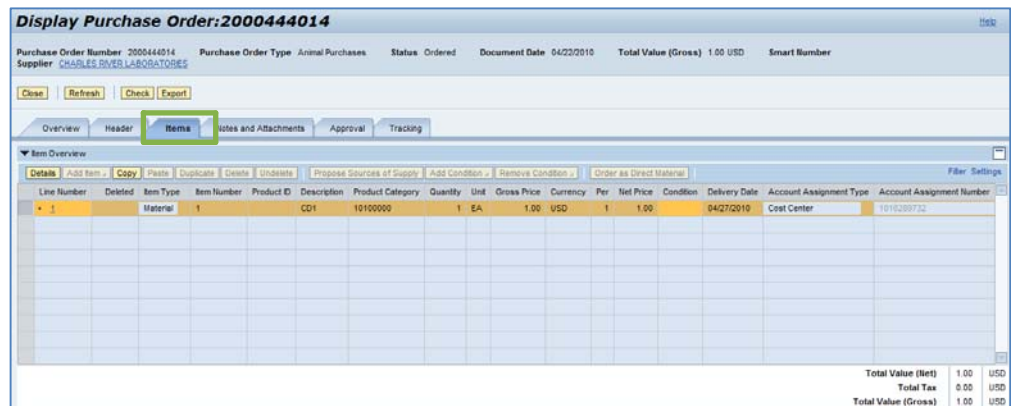
- Notice that the Purchasing Organization and Purchasing Group are now located on this Overview screen.



6. **Header Tab.** The “Header” tab contains additional information on the Purchasing Ship-to-Address, Pricing, and the Personnel associated with the order. From the header screen, you can access additional detail including notes and attachments, output documents associated with the PO, budget information, payment terms, extended PO history, and document totals.



7. **Items Tab.** The “Items” tab contains the line item details from the original shopping cart.



8. Notes and Attachments Tab. The “Notes and Attachments” tab displays a summary of the notes and documents attached to the order, and allows you to access the individual notes and documents.

Display Purchase Order:2000444014

Purchase Order Number 2000444014 Purchase Order Type Animal Purchases Status Ordered Document Date 04/22/2010
 Total Value (Gross) 1.00 USD Smart Number Supplier CHARLES RIVER LABORATORIES

Close Refresh Check Export

Overview Header Items **Notes and Attachments** Approval Tracking

▼ Notes

Add Clear Filter Settings

Assigned To	Category	Text Preview
Item01*CD1*	Supplier Text	CONFIRM TO FAX 410-055-0891VL

▼ Attachments

Add Attachment Edit Description Versioning Delete Create Qualification Profile Filter Settings

Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed By	Changed On
The table does not contain any data											

Close Refresh Check Export

9. Approval Tab. The “Approval” tab shows the approval status for the order along with any approval notes.

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Purchase Order Number 2000444014 Purchase Order Type Animal Purchases Status Ordered Document Date 04/22/2010
 Total Value (Gross) 1.00 USD Smart Number Supplier CHARLES RIVER LABORATORIES

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Overview Header Items Notes and Attachments **Approval** Tracking

Current Status: Finished Header Approval Note
 Current Process Step:
 Currently Processed By:

Header Item

Header Approval Status

Add Approver Remove Approver Settings

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
001			system	04/22/2010 15:41:57	04/22/2010 15:41:57	

Reviewer(s) for the Document

Add Reviewer Remove Reviewer Settings

Reviewer Type	Processor	Received On	Processed On	Forwarded By
The table does not contain any data				

Close Refresh Check Export

10. Tracking Tab. The “Tracking” tab shows process the order has passed through, including the history, status, version overview, and changed documents.

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Purchase Order Number 2000444014 Purchase Order Type Animal Purchases Status Ordered Document Date 04/22/2010 Total Value (Gross) 1.00 USD Smart Number Supplier CHARLES RIVER LABORATORIES

Close Refresh Check Export

Overview Header Items Notes and Attachments Approval **Tracking**

▼ History

View: United States Dollar Filter Settings

Document	Name	Document Number	Backend Document Number	Status	Date	Value	Currency
Purchase Order	UPUR29 04/22/2010 13:07	2000444014	2000444014	Ordered	04/22/2010	1.00	USD
Shopping Cart	UPUR29 04/22/2010 13:07	1001077600		Approved	04/22/2010	1.00	USD

▼ Status

System Status
 Created > Complete > Document Completed > Ordered

▼ Version Overview

Detail Compare

EP	Version	Document/Version Type	Created On	Changed On	Document Name
2		Active Document	04/22/2010 15:41:52	04/22/2010 15:42:05	UPUR29 04/22/2010 13:07

▼ Change Documents

Changed Since Changed From/To Search Expand All Collapse All Hide Query Filter Settings

Header/Item Attribute	Old Value	New Value	Changed By	Changed On	Changed At	Version
Header						
Item Number 1 - CD1						

Close Refresh Check Export