

FisherSci.com

Requisition and Order Tracking



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Requisition and Order Tracking

QuikTips offers a systematic guide to familiarize purchasing professionals and Administrators on the use of the following Requisition and Order Tracking topics including:

- Order Status and Shipment Tracking
- Review Requisitions and Audit Trail
- Approve Requisitions (Administrator/SuperUser Only)

What is Order Status?

Order Status displays all of your company's online, phone and faxed Fisher orders that have been processed and for up to 90 days after they've been paid. This includes back orders, shipped orders, invoiced orders, paid orders, and in-progress orders as well as returns and credits. The Order Status display is determined by account number, not by user. All logged-in registered users in your company see the same list.

Why use Order Status?

One-click access to information on all of your Fisher orders will save you time and frustration. You won't have to write yourself notes, search through files or piles of paper, make telephone calls, or wait for return calls or e-mails for answers about the status of any Fisher order.

What is Review Requisitions and how does it differ from Order Status?

Review Requisitions displays all of your online orders, including those that are in the Approval queue or have been processed. In addition to orders you originated, any order that had your name on it displays in Review Requisitions for a period of time. For example, if you ever had Approval responsibility, the orders that you approved will be listed in Review Requisitions; and, if someone sent you a copy of an order, that order will display. Review Requisitions differs from Order Status in that Order Status displays all of your Fisher orders (including those placed by phone or fax) by account number.

Why use Review Requisitions?

Knowing where your online order is in the approval process can be important to planning and productivity. For example, if you need something by a specific date, use this function to find out if it's been approved, modified, denied, or processed; or if it's waiting for approval or in process.

What is Shipment Tracking?

This function feeds real-time shipping information to fishersci.com from Fisher's primary carrier (UPS) so that you can track your orders. Shipment information is available for any Fisher order that is being shipped from Fisher by UPS, but not for orders that ship direct from the manufacturer. If a project is dependent on the timely delivery of an order, use this function to find out when delivery is expected.

What is View Audit Trail?

View Audit Trail displays the history of online requisitions and orders, which includes approver comments and actions. If the order has been processed, processing date and time is also displayed. The audit trail on processed orders is available for viewing for up to 90 days after the processing date. Having historical and up-to-date information about orders you've placed can help you plan your work and save you time.

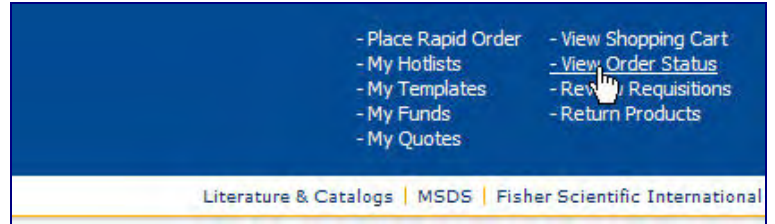
Who can use View Audit Trail?

Only registered users can access this feature, because it's tied to the customer's Fisher account and integrates the customer's business rules and practices. Registered users can view the audit trail on their own requisitions and orders only, unless they have Approver/SuperUser privileges.

Order Status and Shipment Tracking

1. Click **View Order Status** after logging in. You will advance to the **Order Status** page and see a list of orders by account number.

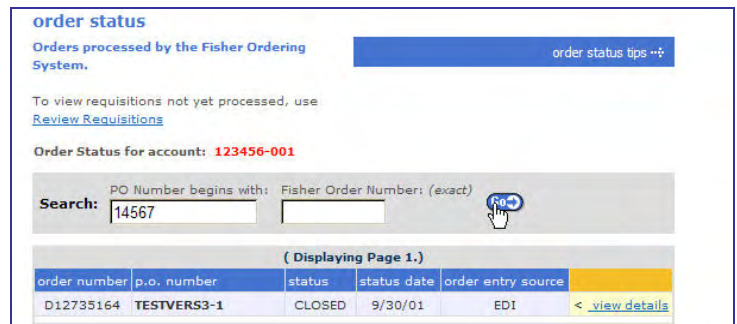
Note: You must be logged in to see and use this feature.



View Order Status

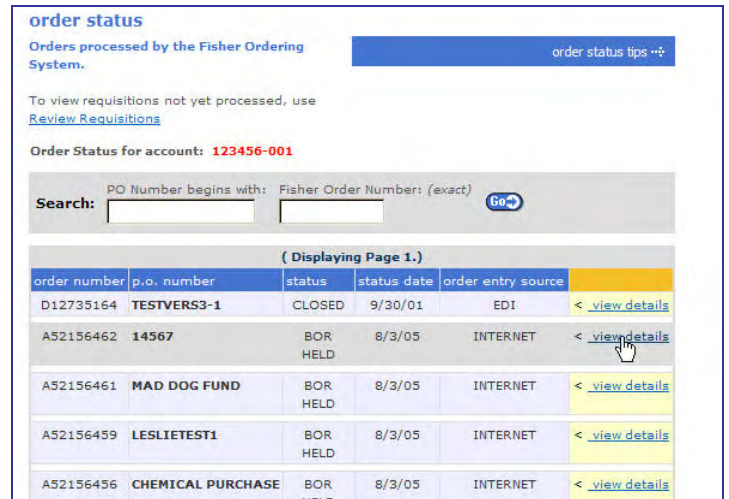
2. Enter the **PO Number** or **Fisher Order Number** (exact) in the **Search** text field(s) provided.
3. Click **Go**

Note: The list displays in descending Fisher Order number sequence.



Order Status Page

4. Click **Review Requisitions** to review your orders that you originated but have not yet been processed (see pg. 7 for steps).
5. Go to the **Next** or **Previous** page of orders for that account.
6. Click **view detail** to advance to the **Order Details** page.



View Details Link

7. (Optional) You can click **Return Products** if you want to initiate a return of a product from this page.
8. To view the item you ordered, click the **catalog number** link.
9. Click **view shipment** to review the status of your shipment.

order details order details tips

The following order was processed by the Fisher Ordering System.
 << [return to order status](#)

account: 123456-001 P.O. # 14567
 FSCO TEST

order # A52156462 [view shipment >>](#)

line	description	Cat. No.	qty	unit and price	amount
001	FB GLV VINYL EXAM PF XS 100/PK	19041190A	3	CS for \$104.03	\$312.09
			3	HOLD 08/03/05 Chicago, IL (MWD)	

[Return Products](#)

Order Details Page

10. Click **return to order status** when you want to return to the **Order Status** page.

Order Details order details tips

The following order was processed by the Fisher Ordering System.
 << [return to order status](#)

account: 123456-001 P.O. # 14567
 FSCO TEST

order # A52156462 [view products >>](#)

On Order

line	description	Cat. No.	quantity	unit and price	amount
001	FB GLV VINYL EXAM PF XS 100/PK Awaiting Release	19041190A	3	Case for \$104.03	\$312.09

Shipment Status Information

11. Click **view products** to review the product you've ordered.

Order Details order details tips

The following order was processed by the Fisher Ordering System.
 << [return to order status](#)

account: 123456-001 P.O. # 14567
 FSCO TEST

order # A52156462 [view products >>](#)

On Order

line	description	Cat. No.	quantity	unit and price	amount
001	FB GLV VINYL EXAM PF XS 100/PK Awaiting Release	19041190A	3	Case for \$104.03	\$312.09

View Products Link

Review Requisitions and Audit Trail

1. Click **Review Requisitions** after logging in. You will advance to the **Review Requisitions** page and see a list of requisitions by date order

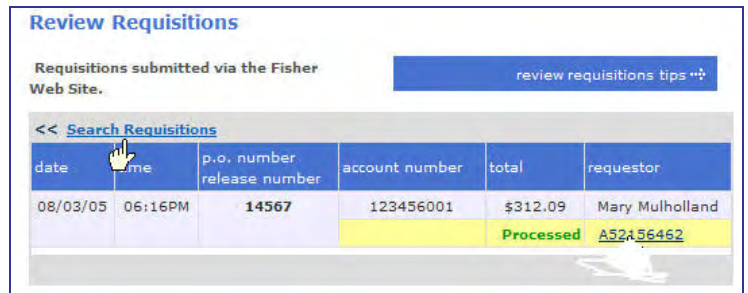
Note: You must be logged in to see and use this feature.



Review Requisitions Link

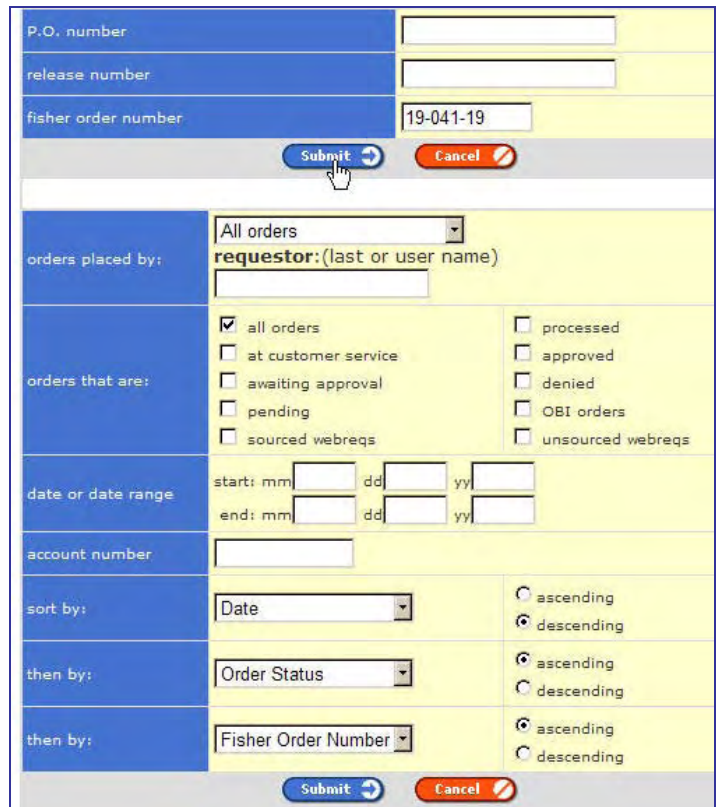
2. At the **Review Requisitions** page, you may initially see your placed requisition or if there are too many to sort through, click **Search Requisitions**.

Note: The status of the order appears under the total dollar value of the order: **Waiting for Approval, Denied, In Progress** (being processed), or **Processed**.



Search Requisitions Link

3. (Optional) Enter your Fisher Order Number, P.O. number and/or account number (exact) in the search fields provided.
4. Click in the checkboxes next to **orders that are** depending on your criteria. You can choose more than one.
5. (Optional) If you want to narrow your search, enter other information such as **account number** and **date ranges**.
6. (Optional) Click the down arrows next to **sort by/then by** and choose from the dropdown list how you want your search results to return in the search results.
7. (Optional) Choose **ascending/descending** next to your selections by clicking in the radio buttons.
8. When finished, click **Submit** and you will return to **Review Requisitions** to view your search results.



Search Requisitions Page

- If you want to see more detail, click the **Order Number** link under the **requestor** column.

Note: Unless you have Approver privileges, you'll see only those for which you are the requestor.

date	time	p.o. number release number	account number	total	requestor
08/03/05	06:16PM	14567	123456001	\$312.09	Mary Mulholland

Requisition Order Link

- Click **view shipment** to view the shipment status. The next page will display information for each package in that shipment.

line	description	Cat. No.	qty	unit and price	amount
001	FB GLV VINYL EXAM PF XS 100/PK	19041190A	3	CS for \$104.03	\$312.09

View Shipment Link

- At the shipment status page, you can click **view products** to review the items in your order.
- Click **return to review requisitions** when finished.

Note: If the order was sent UPS (as most Fisher shipments are), you'll see a red Track Shipment button at the top of the chart for each package. Click for details such as number of packages, tracking number, when delivered, where delivered, and who signed for it.

line	description	Cat. No.	quantity	unit and price	amount
001	FB GLV VINYL EXAM PF XS 100/PK Awaiting Release	19041190A	3	Case for \$104.03	\$312.09

View Products Link

13. Click **view audit trail** for or a history of actions taken on this order.

requisition details order details tips

The following order was processed by the Fisher Ordering System.
 << [return to review requisitions](#)

account: 123456-001 **P.O. #** 14567
 FSCO TEST

order # A52156462 [view shipment >>](#)
[view audit trail >>](#)

line	description	Cat. No.	qty	unit and price	amount
001	FB GLV VINYL EXAM PF XS 100/PK	19041190A	3	CS for \$104.03	\$312.09
			3	HOLD 08/03/05 Chicago, IL (MWD)	

[Return Products](#)

View Audit Trail Link

14. Click **return to review requisitions** when you are finished.

Audit Trail audit trail tips

This is the full history of this order.
 << [return to review requisitions](#)

account: 123456-001 **placed by:** John Baptist
 FSCO TEST **phone:** 800-800-8000

P.O. # PURCHASING [view products >>](#)
order # A52357034 [view shipments >>](#)

PROCESSED 08/23/2005 08:03:42 EDT by the Fisher Ordering System

[view shipments >>](#)

Audit Trail Page

Approve Requisitions (Administrator/SuperUsers Only)

Registered Administrators/SuperUsers with approver privileges will follow the above steps in Review Requisitions in addition to the steps below:

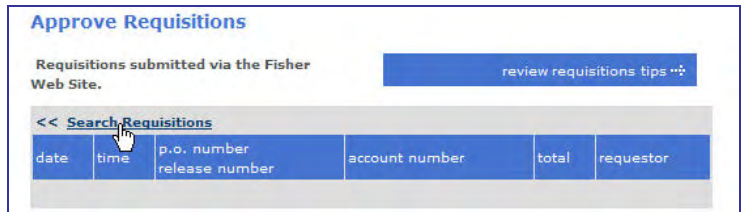
1. Click on **Approve Requisitions** after logging in to the site.

Note: You will not see this link unless you have access to this function.



Approve Requisitions Link

2. (Optional) Click **Search Requisitions** if you don't see the requisition you want to approve.



Search Requisitions Link

3. (Optional) Enter your **Fisher Order Number, P.O. number** and/or **account number** (exact) in the search fields provided.
4. Click in the checkboxes next to **orders that are** depending on your criteria. You can choose more than one.
5. (Optional) If you want to narrow your search, enter other information such as **account number** and **date ranges**.
6. (Optional) Click the down arrows next to **sort by/then by** and choose from the dropdown list how you want your search results to return in the search results.
7. (Optional) Choose **ascending/descending** next to your selections by clicking in the radio buttons.
8. When finished, click **Submit** and you will return to **Review Requisitions** to view your search results.

A screenshot of the search requisitions page form. It contains several sections:

- Search Fields:** P.O. number, release number, fisher order number (with value '19-041-19').
- Buttons:** Submit and Cancel.
- Orders placed by:** A dropdown menu set to 'All orders' and a text field for 'requestor:(last or user name)'.
- Orders that are:** A grid of checkboxes for 'all orders', 'at customer service', 'awaiting approval', 'pending', 'sourced webreqs', 'processed', 'approved', 'denied', 'OBI orders', and 'unsourced webreqs'.
- Date or date range:** Fields for start and end dates in mm/dd/yy format.
- Account number:** A text input field.
- Sort and Then By:** Three rows, each with a dropdown menu and radio buttons for 'ascending' and 'descending'. The first row is for 'sort by' (set to 'Date'), the second for 'then by' (set to 'Order Status'), and the third for 'then by' (set to 'Fisher Order Number').
- Buttons:** Submit and Cancel at the bottom.

Search Requisitions Page

To Approve:

9. Click the **approve** radio button if you see the requisition you want to approve in the list at this page.
10. Click the **Submit** button.



Approve Requisitions

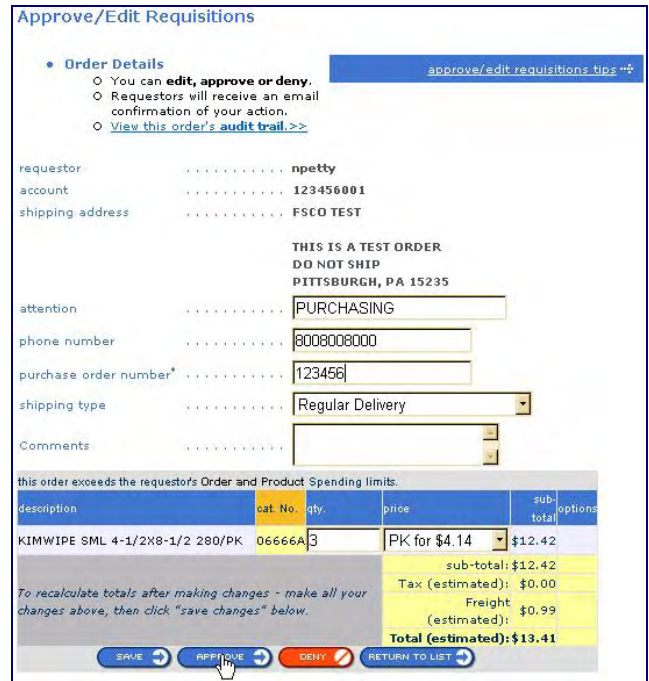
Alternate:

9. Click **Edit** if you want to add comments or modify elements of the requisition before approving.



Edit Link

10. Type over text in any of the available text fields (**attention, phone number, PO number**).
11. Select another shipping type if desired. (*Warning: this may increase your shipping charges – please check your contract agreement for pricing.*)
12. Add text into the **comments** field if desired.
13. Type over and change the amount in the **quantity** field.
14. Click the downward arrow under **price** to select another pricing option if desired.
15. Click **APPROVE**



Approve/Edit Requisitions Page

To Deny:

9. Click the **deny** radio button if you see the requisition you are looking for immediately in the list.
10. Click **Submit**



Deny Radio Button Selected

11. Click **Edit** if you want to add comments or modify elements of the requisition before approving

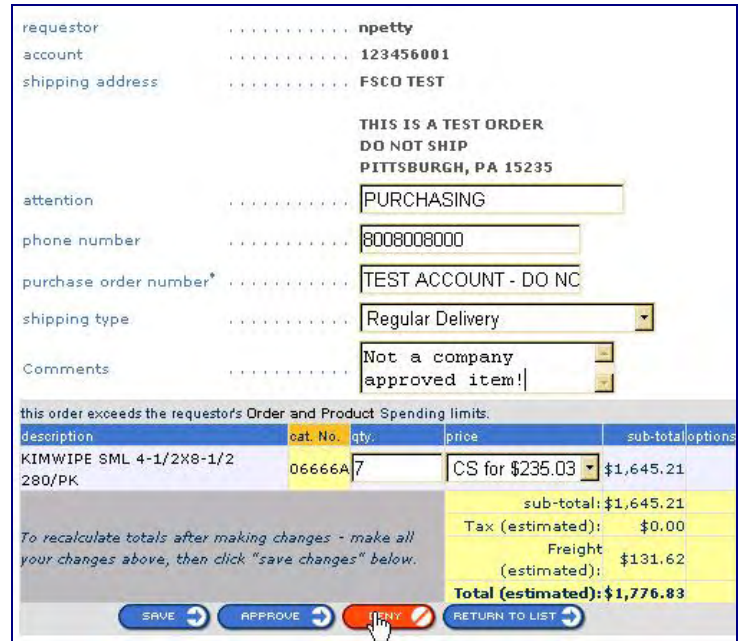


Edit Link

12. Add text into the **comments** field.
13. Click **DENY**

Note: If you only need to edit, type over text or change information and then click **SAVE**.

Note: If you are only viewing information and not changing anything, click on **RETURN TO LIST**.



Deny Button

14. View the approval status message.

The screenshot shows the 'Approve Requisitions' page. At the top, it says 'Requisitions submitted via the Fisher Web Site.' with a 'review requisitions tips' button. Below that is a red message: 'The orders have been submitted and their statuses will be updated upon completion'. There is a '<< Search Requisitions' link and a table with columns: date, time, p.o. number release number, account number, total, and requestor.

Approve Requisitions Page Message

15. If you want to see more detail, click the **Order Number** link under the **requestor** column.

Note: The status of the order appears under the total dollar value of the order: **Waiting for Approval, Denied, In Progress** (being processed), or **Processed**.

The screenshot shows the 'Review Requisitions' page. It has the same header as the previous page. Below the search link is a table with columns: date, time, p.o. number release number, account number, total, and requestor. The table contains three rows of data, with the 'total' column showing the status (e.g., 'Processed') and a link to the order number.

date	time	p.o. number release number	account number	total	requestor
08/03/05	07:16PM	PURCHASING	123456001	\$155.22 Processed	John Baptist A52156465
08/03/05	07:09PM	PURCHASING	123456001	\$168.15 Processed	John Baptist A52156464
08/03/05	06:16PM	14567	123456001	\$312.09 Processed	Mary Mulholland A52156462

Review Requisitions Page

16. You can click **return to review requisitions** to return to the previous page at any time.

17. You can click **Return Products** to initiate a return for this product.

18. Click **view audit trail** for or a history of actions taken on this order.

The screenshot shows the 'requisition details' page. It has an 'order details tips' button. The text says 'The following order was processed by the Fisher Ordering System.' and includes a '<< return to review requisitions' link. Below that are fields for 'account: 123456-001 FSCO TEST', 'P.O. # 14567', 'order # A52156462', 'view shipment >>', and 'view audit trail >>'. At the bottom is a 'Return Products' button.

line	description	Cat. No.	qty	unit and price	amount
001	FB GLV VINYL EXAM PF XS 100/PK	19041190A	3	CS for \$104.03	\$312.09
			3	HOLD 08/03/05 Chicago, IL (MWD)	

Requisition Details

19. Click **return to review requisitions** when you are finished.

Audit Trail

This is the full history of this order. audit trail tips ⓘ

[<< return to review requisitions](#)

account: 123456-001 FSCO TEST	placed by: John Baptist phone: 800-800-8000
P.O. # PURCHASING	
order # A52357034	view products >> view shipments >>

PROCESSED 08/23/2005 08:03:42 EDT by the Fisher Ordering System

[view shipments >>](#)

Audit Trail Page

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