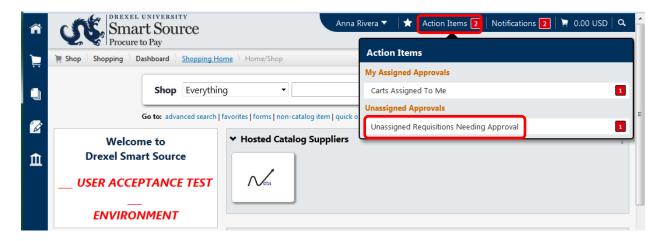
Smart Source Step-by-Step Guide

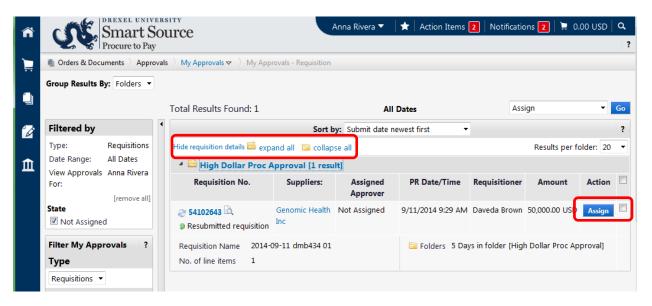
Approving a Requisition

Procedure

 From the Smart Source home page, select the Action Items link at the top of the user interface. You will see, among potentially other things, that you have a requisition to approve. Select the Unassigned Requisitions Needing Approval link.



2. The screen is refreshed, displaying a list of folders containing requisitions awaiting your review/approval. Expand the folder to view the list of requisitions and select the **Assign** icon. *Note, the folder name corresponds to the name of the workflow step requiring your review.*



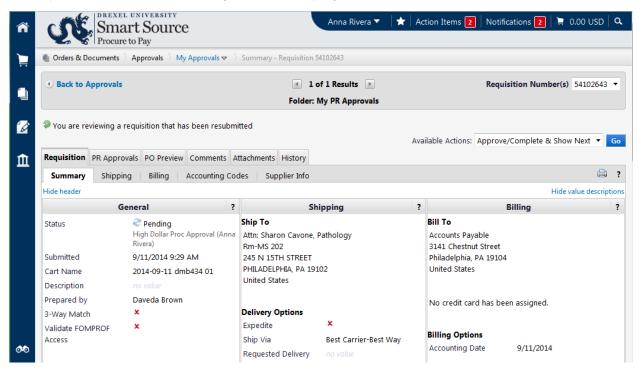
- 3. The screen is refreshed. *Note, by assigning the requisition, you have taken ownership of the document. This causes the requisition to be removed from the folder shared between other approvers. With this action, the requisition has been moved to your "My PR Approvals" folder.*
- 4. Select the **Action Items** link at the top of the user interface. Select the **Requisitions to Approve** link.



5. The screen is refreshed, displaying a list of folders containing requisitions assigned to you. Expand the My PR Approvals folder to view the list of requisitions awaiting your review/approval. Select the Requisition Number link to view the transaction.

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1	Group Results By: Folders 💌		Total Results Found: 1		Ĩ	\II Dates	A	Assign	•	Go
í de	Filtered by	٩		Sort	by: Submit date	e newest first	•			?
	Type: Requisitions		Hide requisition details 🚔 exp	and all 🗎 colla	ipse all			Results per	folder: 20	•
血	Date Range: All Dates View Approvals Anna Rivera		4 🖻 My PR Approvals	[1 result]						
	For: [remove all]		Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action	
	Assigned Approver		 54102643 (a) Resubmitted requisition 	Genomic Health Inc	Anna Rivera	9/11/2014 9:29 AM	Daveda Brown	50,000.00 USD	Approve	
	Filter My Approvals ?		Requisition Name 2014-0	9-11 dmb434 01		🗀 Folders 0 Day	ys in folder [My	PR Approvals]		
	Туре		No. of line items 1			5 Day	ys in folder [Hig	h Dollar Proc Ap	proval]	

6. The requisition is displayed. Click the various tabs to review the document. *Note, if you are reviewing a requisition with a form attached (e.g., blanket order request), selecting the item description from the* **Summary** tab will display the form.



7. To add a comment to the requisition, select the **Comments** tab and select the **Add Comment** link. If no issues are identified, skip to the approval step.

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血	Requisition PR Approvals PO Preview Comments Attachments Histo	ory				?
	Add Comment					
	Show comments for Requisition -					
	Records found: 0				?	?

8. A new window is displayed that allows you to capture comments. Select the checkbox next to any individuals you would like to have emailed a copy of the comments. You can add additional recipients, provided they are Smart Source users, by selecting the **Add Email Recipient** link. Once your comments are complete, select the **Add Comment** link.

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1	Orders & Documents Approvals My Approvals Comments - Requisition 54				
	Add Comment ? X This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document. Email notification(s): Anna Rivera (Approver) <ag87@drexel.edu> Daveda Brown (Prepared by) <dmb434@drexel.edu> Mike McLatcher (Approved) <mjm576@drexel.edu> add email recipient</mjm576@drexel.edu></dmb434@drexel.edu></ag87@drexel.edu>	1 Results 🕞	Available Actions: A	Requisition Number(s) 54102643 - Approve/Complete & Show Next - Go	
66	1000 characters remaining expand clear Attach file to this document (optional): Attachment Type File File Name File Browse_ No file selected. Add Comment Cancel	ts have been added			

9. To approve the requisition, select the **Approve/Complete Step** option from the **Available Actions** drop down menu and select the **Go** button.

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📄 🔹 Orders & Documents 👌 Approvals 👌 My Approvals 🗢 👌 C	omments - Requisition 54102643	
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Requisition PR Approvals PO Preview Comments Atta		Approve/Complete & Show Next Approve/Complete Step
		Return to Shared Folder
Add Comment		Place on Hold
		Return to Requisitioner
Show comments for Requisition -		Add Comment
		Add Notes to History
Records found: 0		Copy to New Cart ?
		Reject Requisition
	No comments have been added	

10. To return the requisition to the shared folder to make it available to the other potential approvers for the workflow step, select the **Return to Shared Folder** option from the **Available Actions** drop down menu and select the **Go** button. *Note, the requisition is now available to the other approvers listed on the workflow step.*

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	Add Comment		Place on Hold Return to Requisitioner
	Show comments for Requisition -		Forward to Add Comment
	Records found: 0		Add Notes to History Copy to New Cart ?
			Reject Requisition
		No comments have been added	

11. To return the requisition to the requester, select the **Return to Requisitioner** option from the **Available Actions** drop down menu and select the **Go** button.

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()	(1) Back to Approvals	🔳 1 of 1 Results 🕨	Requisition Number(s) 5410264	13 🔻
		Folder: My PR Approvals		
1	${oldsymbol arphi}$ You are reviewing a requisition that has been resubmitted			
		Available Action	ons: Approve/Complete Step	Go
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			Return to Shared Folder	9 ?
	Add Comment		Return to Requisitioner	
	Show comments for Requisition -		Forward to Add Comment	
	Records found: 0		Add Notes to History Copy to New Cart	?
			Reject Requisition	
		No comments have been added		

12. A new window appears. Enter a reason for returning the requisition and select the **Return to Requisitioner** icon.

Return to Requisitioner ? X
Return the requisition to the requisitioner as a draft cart so they can correct errors and resubmit for approval.
Reason for return
1000 characters remaining expand clear
Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.
Return to Requisitioner Car

You have successfully approved/returned a requisition.