Smart Source Step-by-Step Guide
Approving a Requisition

Procedure

1. 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.

   ![Smart Source Home Page]

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.

   ![Smart Source Requisitions Page]
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.
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.
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.

![Add Comment Window](image1.png)

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

![Approve/Complete Step](image2.png)
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.*

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

**You have successfully approved/returned a requisition.**