Drexel University Smart Source — Procure to Pay

Approver User Guide

Approvers review Shopping Carts for:
- Accuracy (cost center, shipping information etc.)
- Allowable/Business Purpose of goods/service being requested
- Purchase is consistent with University policy, procedures, guidelines
- Act as a second set of eyes on the transaction

Approvers review invoices for:
- Accuracy (correct PO referenced, correct line item(s), correct quantity, item amount, overall amount, etc.)
- Discount, tax, shipping & handling

Accessing the System
1. Open your web browser and go to https://**one**.**drexel**.edu/
2. Enter your UserID and Password. Click on "connect".
3. Click "Employee" tab. Click on the "Log into **Drexel Smart Source**"

Drexel Smart Source Approval Levels
For most cost centers there is a single approval level in *Smart Source.*
Where departments have opted to have two levels, the first is up to $25,000; the second is >$25,000
- Each department has two individuals in each approval level
- Requests will be subject to reviews beyond departmental review based on the characteristics of the request. Approval steps can be viewed by selecting the *PR Approvals* tab from the requisition.
- Approvers are notified via email when a document has been routed for their approval. The email contains a link that takes the recipient directly to DrexelOne

Approval Navigation
Smart Source Banner (top right of any page in *Smart Source)*
- Action Items link to all your assigned or unassigned requests, invoice and approvals

Approve a Request or invoice:
NOTE: To approve/return a request one must first assign the order to oneself; must do the same to approve invoices

1. Click on the unassigned request or invoices link displayed under Action Items) or click on *Orders and Documents menu* in the menu bar
2. When list displays you can check the box at the far right next to "assign"
    a. To review before assigning to oneself expand the approval folder(s) to view the request or invoice
    b. Click on the request/invoice number to view the contents of the order
    c. Scroll to the top of the page and select from the *Available Actions* drop down menu; click assign

3. Once assigned it appears in the Action Items list as requests or invoices to approve. Select approve from the list of available actions to approve the document.

Modify a Request
NOTE: Requests may not be modified by an approver. Rather, return the request to the requester with instructions on how to modify the request so if necessary, the request can be resubmitted.

Reject a Request in total or individual Line Items
NOTE: Catalog requests must be rejected in full. Invoices may not be rejected at all; they are returned to Accounts Payable
1. Locate the request via action items; assign to yourself
2. To reject the entire Request, click on the checkbox to the far right, navigate to the top "Available Actions" select "reject requisition" option to return to the requester
3. The request will automatically be added to the requester's action items as a "returned" requisition
4. To reject **individual** items, after assigning the request, navigate to the line items
5. Select each item to reject by clicking on the box at the end of the line item
6. Scroll to the top of the *Supplier /Line Item Details* area
7. Select from the drop down menu "reject selected items"
8. In the pop-up window, enter a reason for rejecting the line item(s) or order
9. Click on the "Reject Line Item"
10. Requester will be notified of rejected items.

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