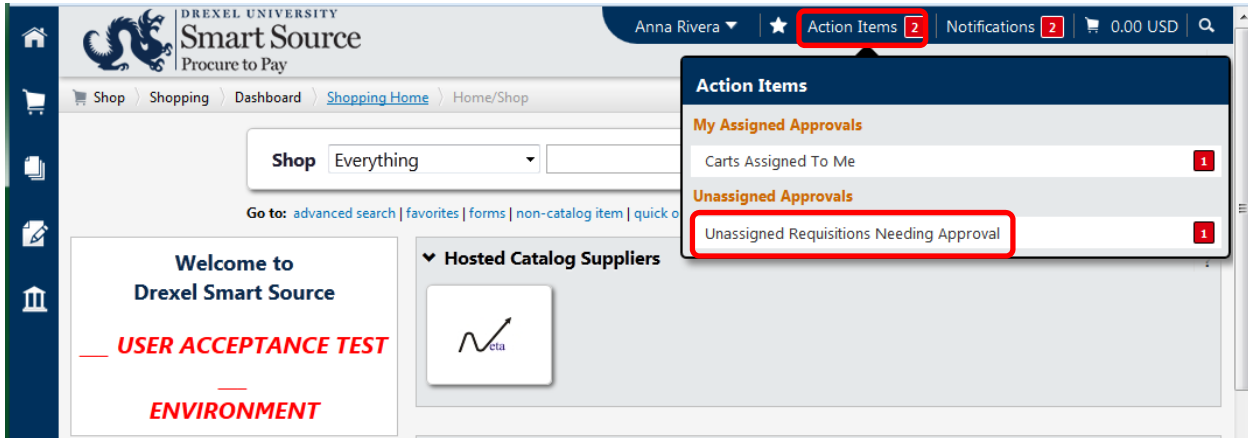


Smart Source Step-by-Step Guide

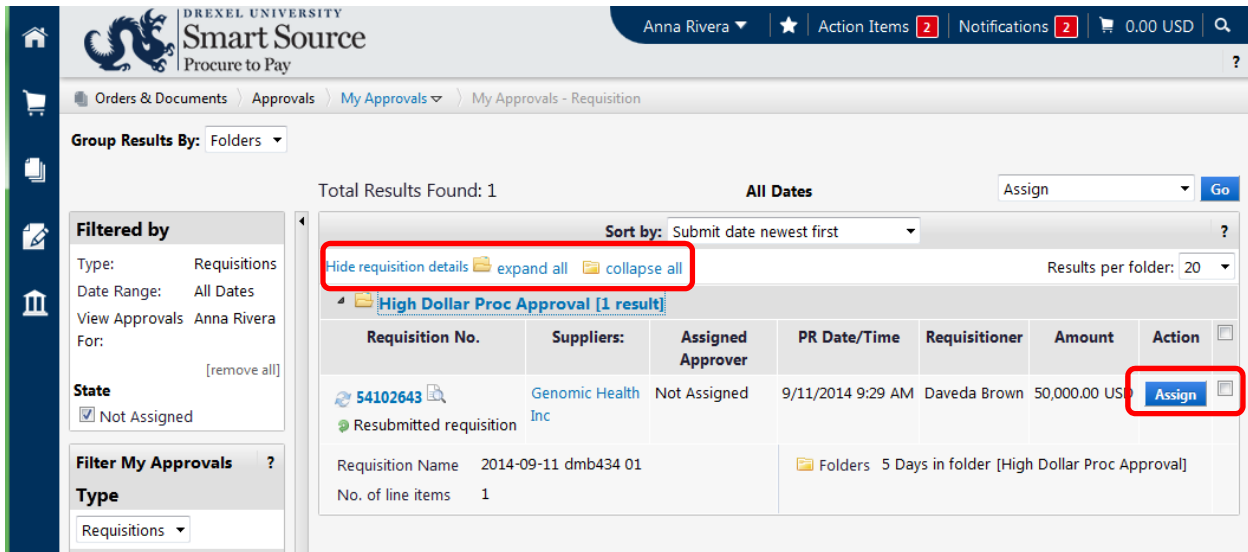
Approving a Requisition

Procedure

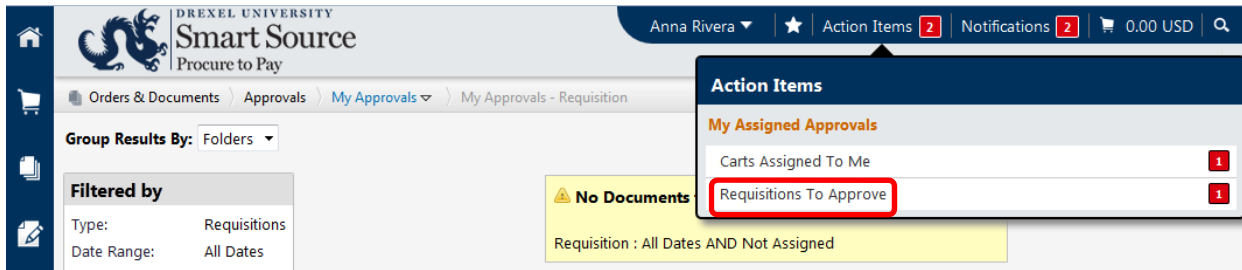
1. From the **Smart Source** home page, select the **Action Items** link at the top of the user interface. You will see, among potentially other things, that you have a requisition to approve. Select the **Unassigned Requisitions Needing Approval** link.



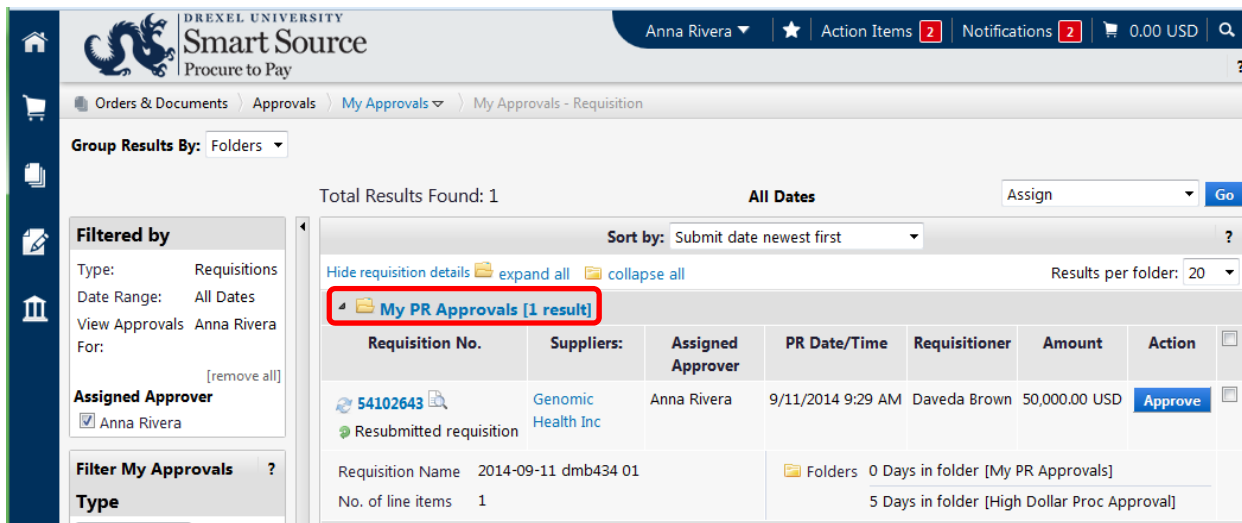
2. The screen is refreshed, displaying a list of folders containing requisitions awaiting your review/approval. Expand the folder to view the list of requisitions and select the **Assign** icon. *Note, the folder name corresponds to the name of the workflow step requiring your review.*



- 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.*
- Select the **Action Items** link at the top of the user interface. Select the **Requisitions to Approve** link.



- 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.



- 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.*

Smart Source Procure to Pay

Anna Rivera | Action Items 2 | Notifications 2 | 0.00 USD

Orders & Documents > Approvals > My Approvals > Summary - Requisition 54102643

Back to Approvals | 1 of 1 Results | Requisition Number(s) 54102643

Folder: My PR Approvals

You are reviewing a requisition that has been resubmitted

Available Actions: Approve/Complete & Show Next | Go

Requisition | PR Approvals | PO Preview | **Comments** | Attachments | History

Summary | Shipping | Billing | Accounting Codes | Supplier Info

General	Shipping	Billing
Status Pending High Dollar Proc Approval (Anna Rivera)	Ship To Attn: Sharon Cavone, Pathology Rm-MS 202 245 N 15TH STREET PHILADELPHIA, PA 19102 United States	Bill To Accounts Payable 3141 Chestnut Street Philadelphia, PA 19104 United States
Submitted 9/11/2014 9:29 AM	Delivery Options Expedite	No credit card has been assigned.
Cart Name 2014-09-11 dmb434 01	Ship Via Best Carrier-Best Way	Billing Options Accounting Date 9/11/2014
Description no value	Requested Delivery no value	
Prepared by Daveda Brown		
3-Way Match x		
Validate FOMPROF x		
Access		

- 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.

Smart Source Procure to Pay

Anna Rivera | Action Items 2 | Notifications 2 | 0.00 USD

Orders & Documents > Approvals > My Approvals > Comments - Requisition 54102643

Back to Approvals | 1 of 1 Results | Requisition Number(s) 54102643

Folder: My PR Approvals

You are reviewing a requisition that has been resubmitted

Available Actions: Approve/Complete & Show Next | Go

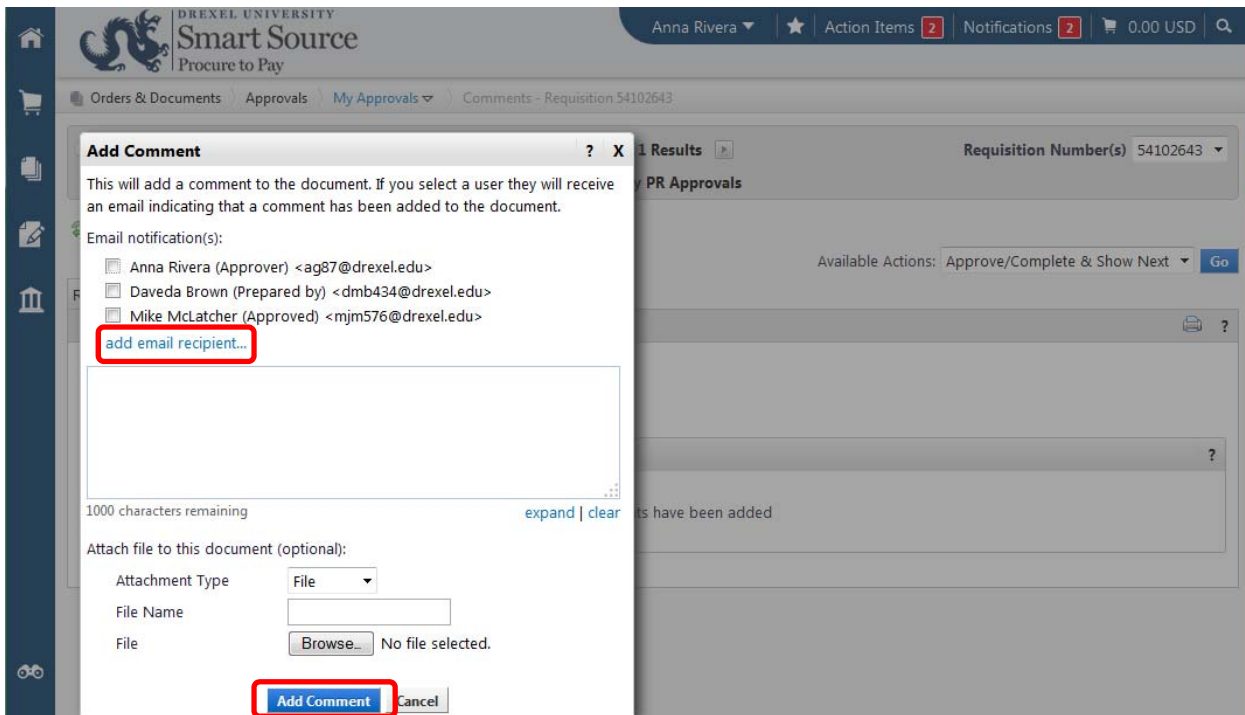
Requisition | PR Approvals | PO Preview | **Comments** | Attachments | History

Add Comment

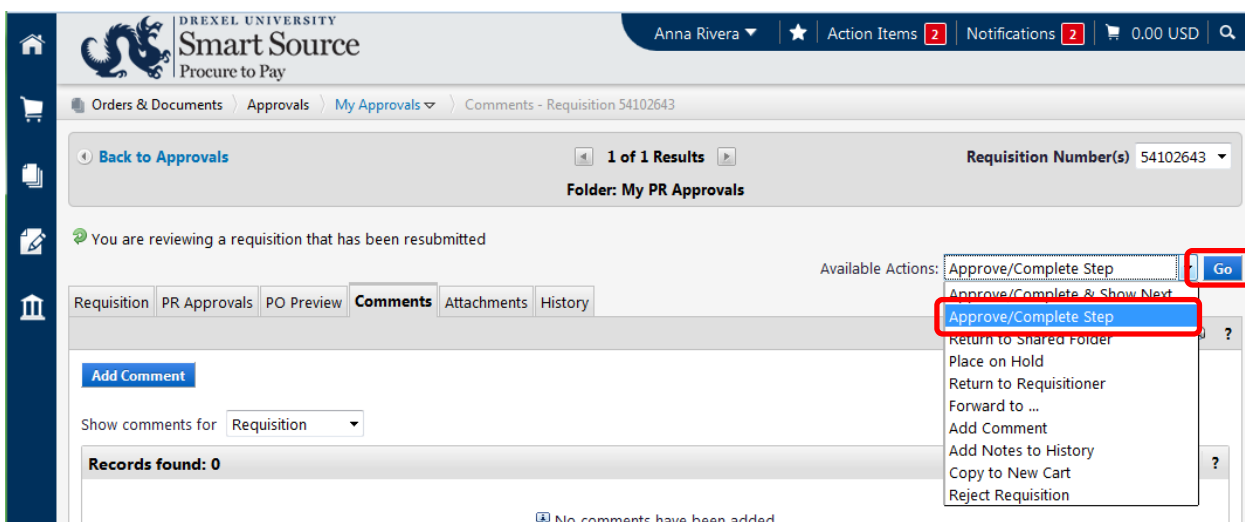
Show comments for: Requisition

Records found: 0

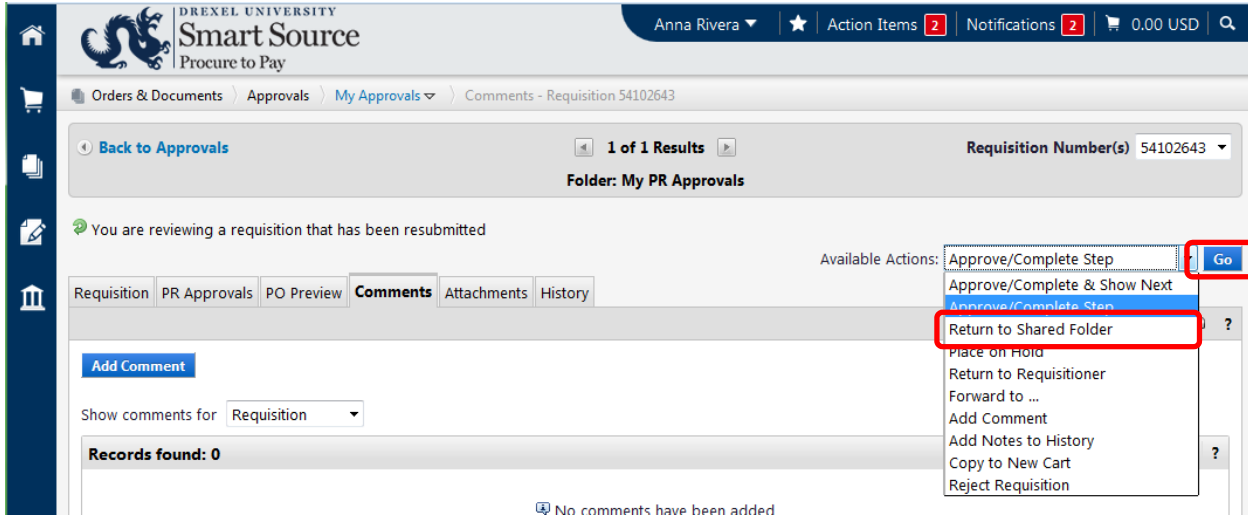
- A new window is displayed that allows you to capture comments. Select the checkbox next to any individuals you would like to have emailed a copy of the comments. You can add additional recipients, provided they are Smart Source users, by selecting the **Add Email Recipient** link. Once your comments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



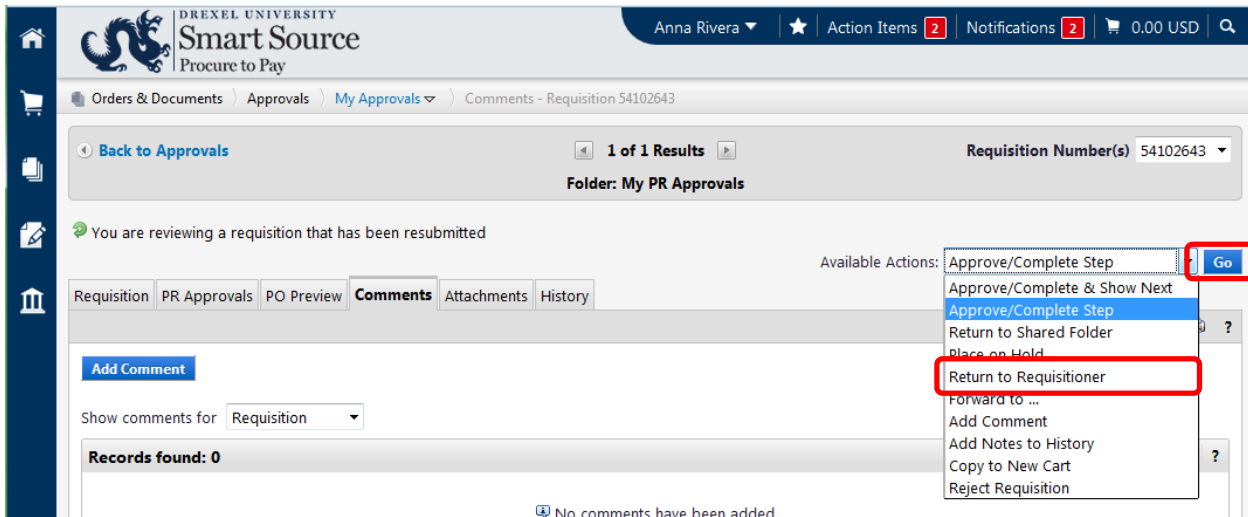
- To approve the requisition, select the **Approve/Complete Step** option from the **Available Actions** drop down menu and select the **Go** button.



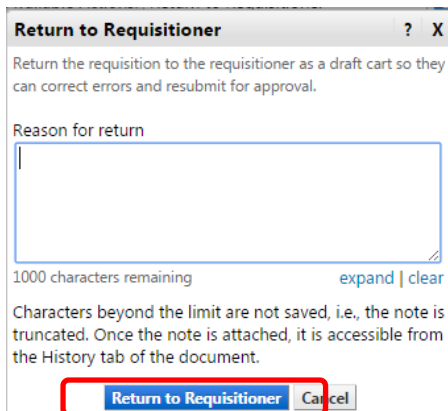
10. To return the requisition to the shared folder to make it available to the other potential approvers for the workflow step, select the **Return to Shared Folder** option from the **Available Actions** drop down menu and select the **Go** button. *Note, the requisition is now available to the other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



The screenshot shows a dialog box titled "Return to Requisitioner" with a close button (X) and a help button (?). The text inside reads: "Return the requisition to the requisitioner as a draft cart so they can correct errors and resubmit for approval." Below this is a text area labeled "Reason for return" with a vertical cursor. Underneath the text area, it says "1000 characters remaining" and "expand | clear". A note below that states: "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." At the bottom, there are two buttons: "Return to Requisitioner" (highlighted with a red box) and "Cancel".

You have successfully approved/returned a requisition.