



# Approving Requisitions By Email



# Purchase Requisition Definition

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The document you are being asked to approve is a requisition (also referred to as a Purchase Requisition or PR). A requisition is a request to place an order. Once all the necessary approvals have been obtained, the requisition becomes a Purchase Order and is sent electronically to the vendor.

# Initial Configuration

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Before you can approve requisitions via email, you need to create an approval code in SmartBuy Plus by following the steps shown on the next three slides. You only need to do this once or whenever you want to change your code.

The first step is to log into [SmartBuyPlus.clarku.edu](https://SmartBuyPlus.clarku.edu) using your Clark credentials.

*Please note that these slides were made using the SmartBuy Plus test site. The primary colors in the actual site will be red instead of blue.*

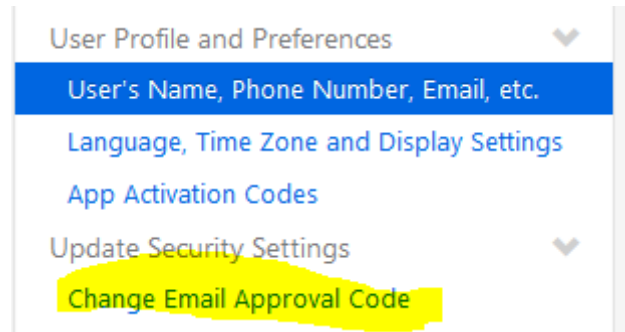
## Setting your approval code

In the upper right hand portion of the screen, click on the small arrow next to your name and then click on “View My Profile.”



# Setting your approval code

Select “Update Security Settings” and the “Change Email Approval Code” from the menu on the left of the screen:



## Setting your approval code

A box will appear allowing you change your code. There is no requirement for minimum length, etc. A brief series of numbers, similar to a Bank PIN, works well.

### Change Email Approval Code ×

Email Approval Code

# Approval Requests

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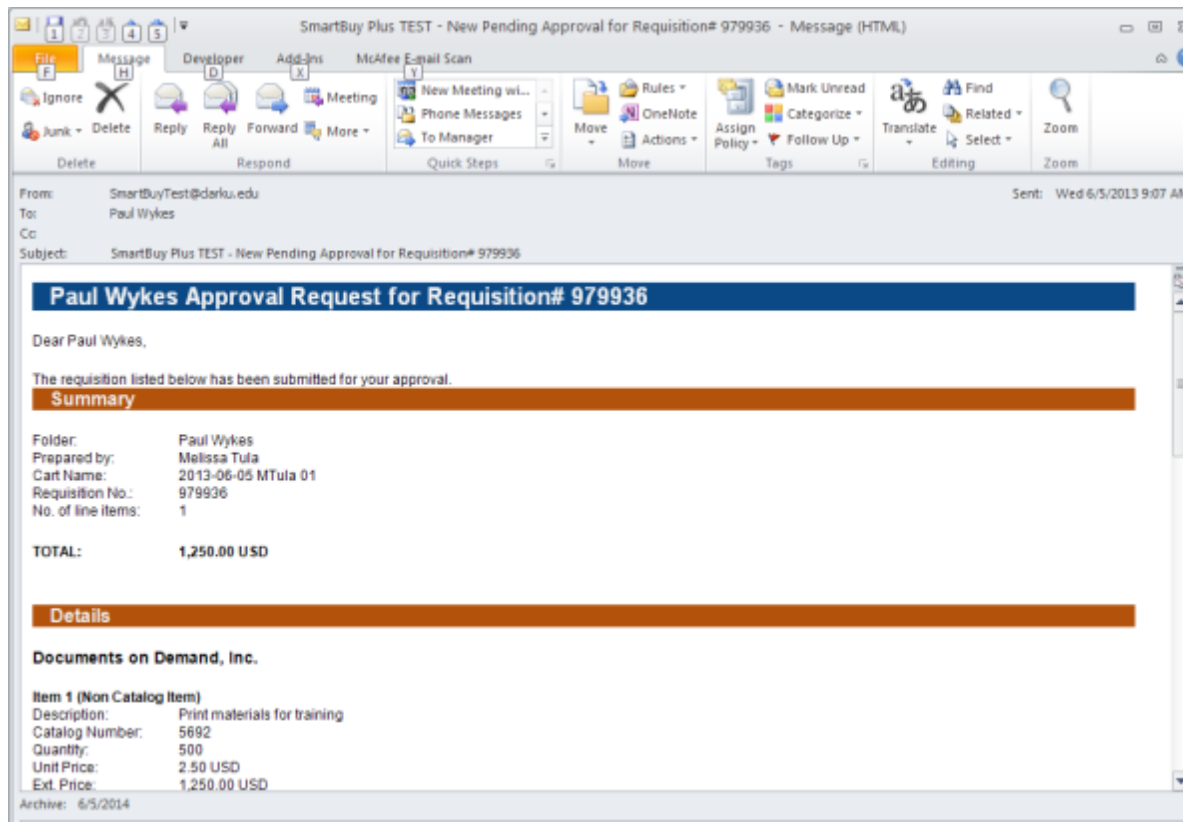
When you receive an approval request, there are three things you can do:

- > Approve the requisition.
- > Return it (usually with a comment).
- > Reject it (also usually with a comment).

Returning it will allow the requestor to modify and resubmit the requisition. Rejecting it will cancel the requisition. If you do not approve the requisition, in most cases you will want to return it with a comment explaining why it will be returned.

# Approval Request Using Email

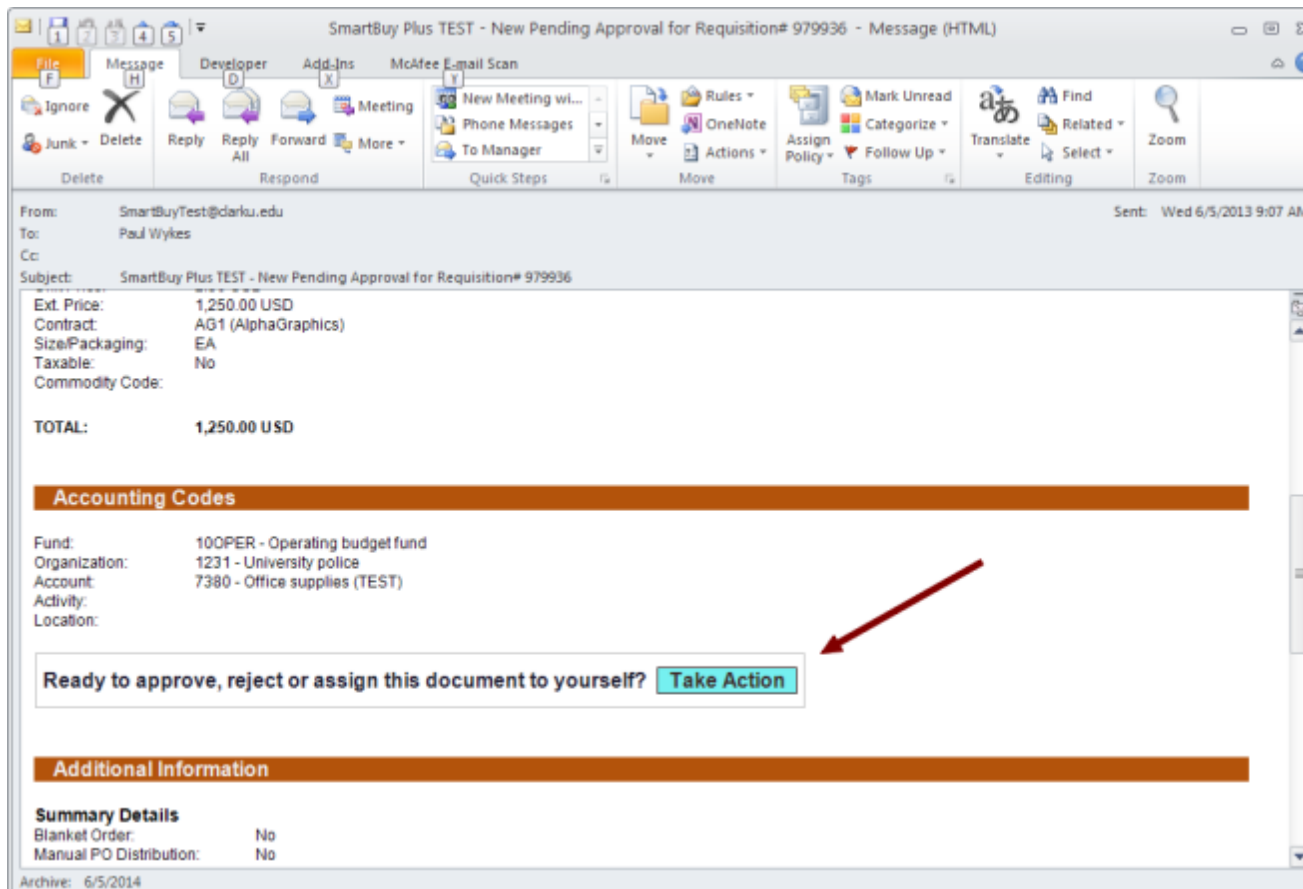
When your approval is requested, you will receive an email similar to the following:





# Approval Request Using Email

You can scroll through the email to review the details of the request. You can then click on the “Take Action” button.



The screenshot shows an email client window titled "SmartBuy Plus TEST - New Pending Approval for Requisition# 979936 - Message (HTML)". The email header includes:

- From: SmartBuyTest@clarku.edu
- To: Paul Wykes
- Subject: SmartBuy Plus TEST - New Pending Approval for Requisition# 979936
- Sent: Wed 6/5/2013 9:07 AM

The main body of the email contains the following details:

- Ext. Price: 1,250.00 USD
- Contract: AG1 (AlphaGraphics)
- Size/Packaging: EA
- Taxable: No
- Commodity Code:
- TOTAL: 1,250.00 USD**

Below this is a section titled "Accounting Codes" with the following information:

- Fund: 10OPER - Operating budget fund
- Organization: 1231 - University police
- Account: 7380 - Office supplies (TEST)
- Activity:
- Location:

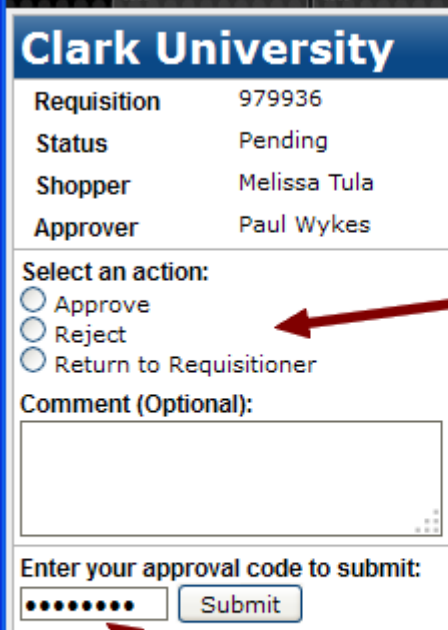
At the bottom of the email body, there is a prompt: "Ready to approve, reject or assign this document to yourself?" followed by a blue button labeled "Take Action". A red arrow points to this button.

Additional sections include "Additional Information" and "Summary Details" (Blanket Order: No, Manual PO Distribution: No).

Archive: 6/5/2014

## Approval Request Using Email

- > A small approval page will appear in your web browser (suitable for smartphones).
- > Select an action. Reject means the requisition is denied and there is no opportunity to change and resubmit it. If you have a question for the requisitioner or need something changed, you should select “Return to Requisitioner” and leave a comment.
- > Optionally enter a comment.
- > Enter your approval code.
- > Click the “Submit Button”.



**Clark University**

Requisition	979936
Status	Pending
Shopper	Melissa Tula
Approver	Paul Wykes

Select an action:

Approve

Reject

Return to Requisitioner

Comment (Optional):

Enter your approval code to submit:

..... Submit

**Enter Approval Code here.**



Please contact  
[pwykes@clarku.edu](mailto:pwykes@clarku.edu)  
if you have any  
questions.

