



## Approving Requisitions Using Web Interface



# 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.

# Web Interface

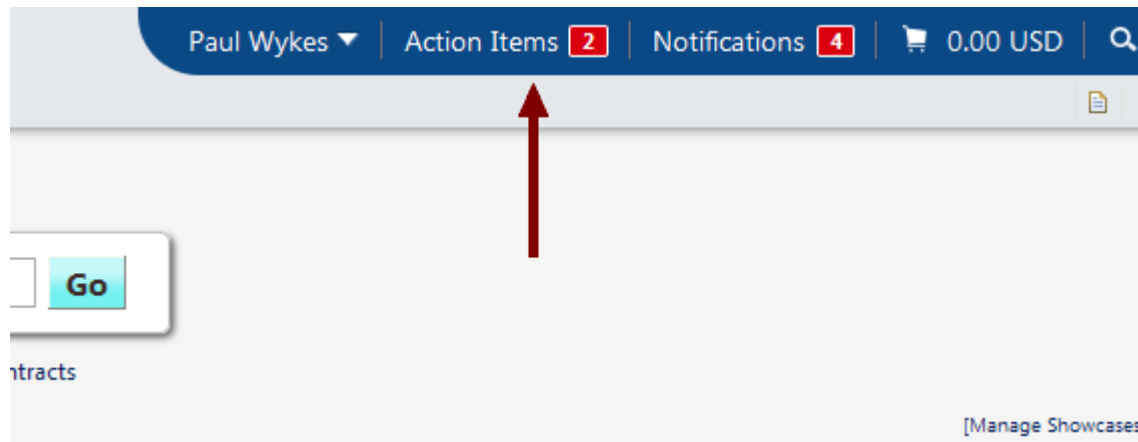
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To approve requisitions using the SmartBuy Plus web interface, log into [SmartBuyPlus.clarku.edu](https://SmartBuyPlus.clarku.edu) using your Clark credentials.

*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.*

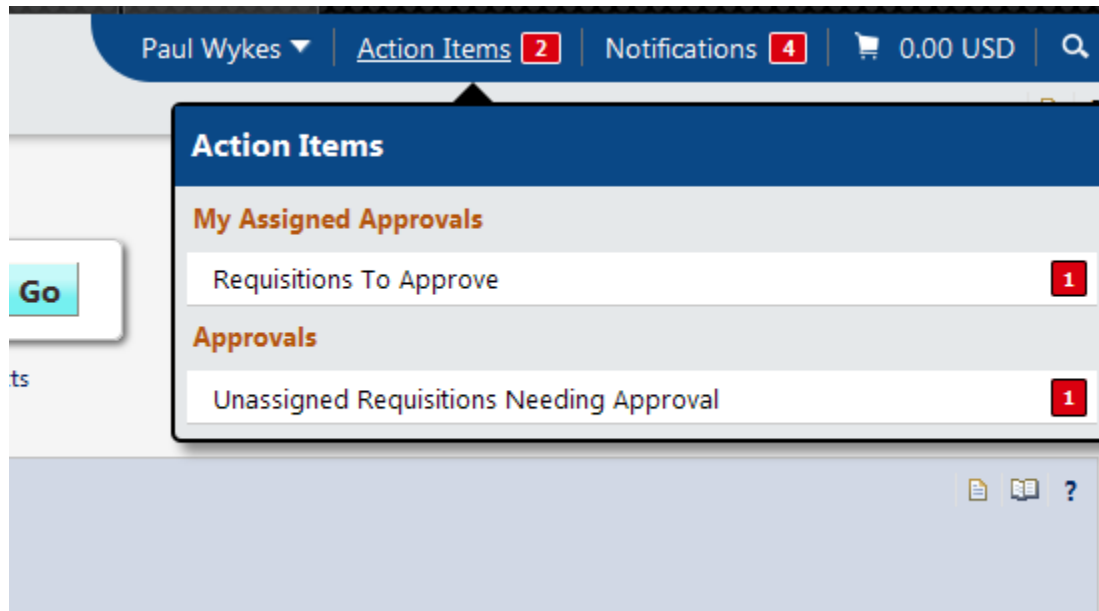
## Action Item Indicator

When you log into SmartBuy Plus, if you have requisitions to approve, there will be a number in red next to “Action Items”



# Action Items Menu

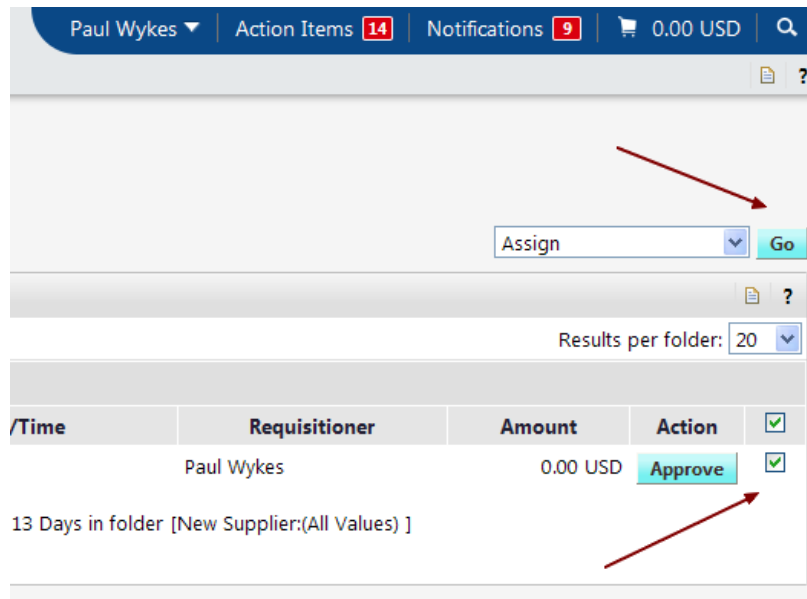
When you click on “Action Items” you will be presented with a menu similar to the following:



Click on the words “Requisitions to Approve” to begin the approval process.

# “Unassigned” Items

Usually requisitions will be “assigned”. If you have “Unassigned Requisitions Needing Approval”, there are only a limited number of action items available to you. If you want to return or reject the requisition, you will first need to assign it to yourself. You can do this by clicking on the checkbox to the right of the requisition; selecting “Assign” from the dropdown box (usually set by default); and then clicking the blue “Go” button. The requisition will then show under “My Assigned Approvals”. (See below.)



Paul Wykes ▾ | Action Items 14 | Notifications 9 | 0.00 USD | 🔍

Assign ▾ | Go

Results per folder: 20 ▾

/Time	Requisitioner	Amount	Action	<input checked="" type="checkbox"/>
	Paul Wykes	0.00 USD	Approve	<input checked="" type="checkbox"/>

13 Days in folder [New Supplier:(All Values) ]

# List of Requisitions Pending Approval

You will now see a list of requisitions that require your approval.

If you have enough information about the requisition from this screen and you want to approve it, you can click on the blue “Approve button” (circled below).



If you want to view more information about the requisition, or take other steps such as rejecting it or returning it, click on the requisition number (see arrow below).

Total Results Found: 2 All Dates

Sort by:

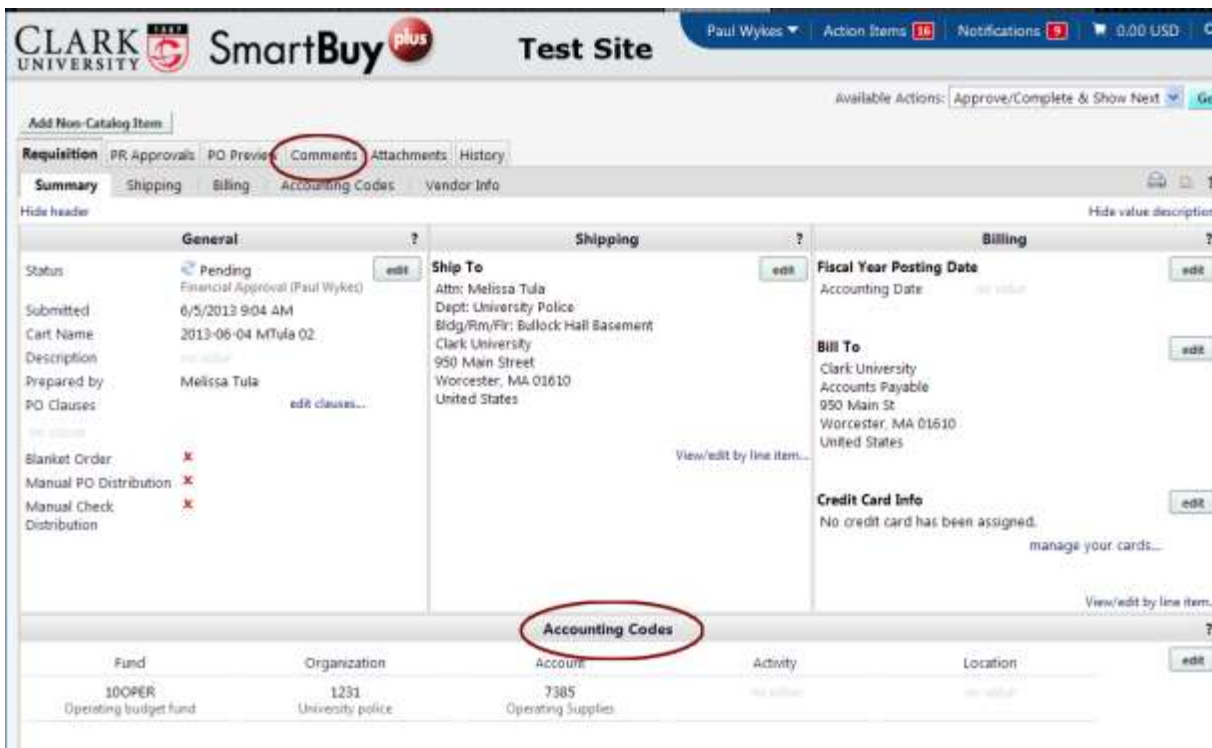
Hide requisition details   Results per folder:

My PR Approvals [2 results]

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
 <a href="#">979691</a>	SHI International Corporation	Paul Wykes	6/5/2013 9:04 AM	Melissa Tula	1,876.00 USD	<input type="button" value="Approve"/>
Requisition Name: 2013-06-04 MTula 02		Folders: 12 Days in folder [My PR Approvals]				
No. of line items: 1						
 <a href="#">979652</a>	Grainger	Paul Wykes	6/4/2013 3:10 PM	Melissa Tula	37,974.60 USD	<input type="button" value="Approve"/>
Requisition Name: 2013-06-04 MTula 01		Folders: 12 Days in folder [My PR Approvals]				
No. of line items: 1						

# Requisition Review Screen

The requisition summary page provides key detail about the order being placed. Some particularly helpful items are highlighted on this and the following page. A comments tab can be used to leave or read comments associated with the order. The accounting codes section shows which account(s) the order will be charged to.



The screenshot shows the SmartBuy requisition review interface. At the top, the navigation bar includes the Clark University logo, 'SmartBuy plus', 'Test Site', and user information for Paul Wykes. The main content area is divided into several sections:

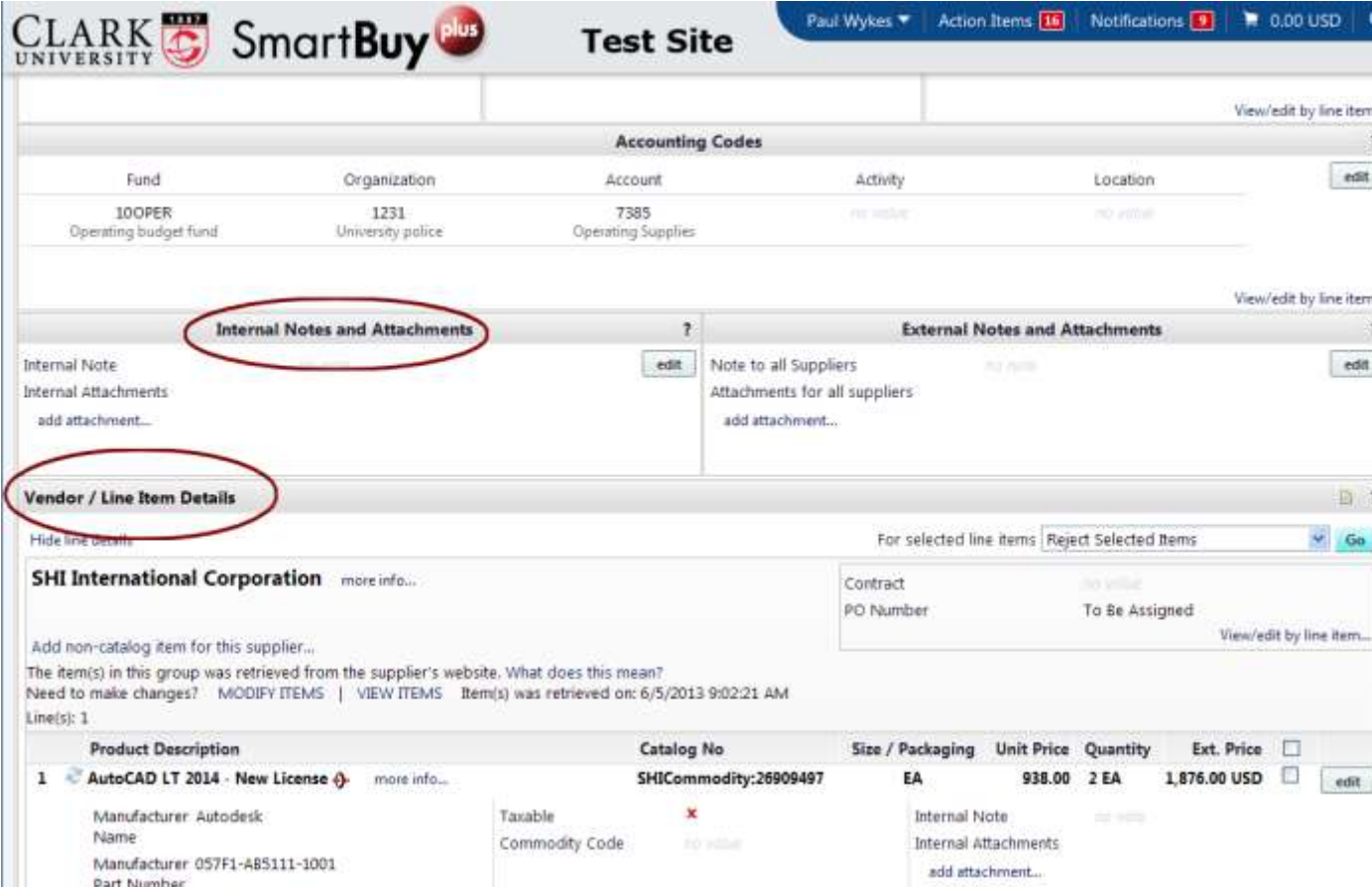
- Navigation:** 'Add Non-Catalog Item' and 'Available Actions: Approve/Complete & Show Next'.
- Requisition Summary:** Includes tabs for 'Requisition', 'PR Approvals', 'PO Preview', 'Comments', 'Attachments', and 'History'. The 'Comments' tab is circled in red.
- Summary Section:** Contains sub-tabs for 'Summary', 'Shipping', 'Billing', 'Accounting Codes', and 'Vendor Info'. The 'Accounting Codes' sub-tab is circled in red.
- General Section:**
  - Status: Pending (Financial Approval by Paul Wykes)
  - Submitted: 6/5/2013 9:04 AM
  - Cart Name: 2013-06-04 MTula 02
  - Description: [Redacted]
  - Prepared by: Melissa Tula
  - PO Clauses: [Redacted]
  - Blanket Order:
  - Manual PO Distribution:
  - Manual Check Distribution:
- Shipping Section:**
  - Ship To: Attn: Melissa Tula, Dept: University Police, Bldg/Rm/Fir: Bullock Hall Basement, Clark University, 950 Main Street, Worcester, MA 01610, United States
- Billing Section:**
  - Fiscal Year Posting Date: [Redacted]
  - Accounting Date: [Redacted]
  - Bill To: Clark University, Accounts Payable, 950 Main St, Worcester, MA 01610, United States
  - Credit Card Info: No credit card has been assigned.
- Accounting Codes Section:**

Fund	Organization	Account	Activity	Location
100PER Operating budget fund	1231 University police	7385 Operating Supplies	[Redacted]	[Redacted]



## Requisition Review Screen (continued)

Internal notes and attachments can contain useful information provided by the requestor. Vendor/Line Item Details displays the vendor information and details about the order being placed.



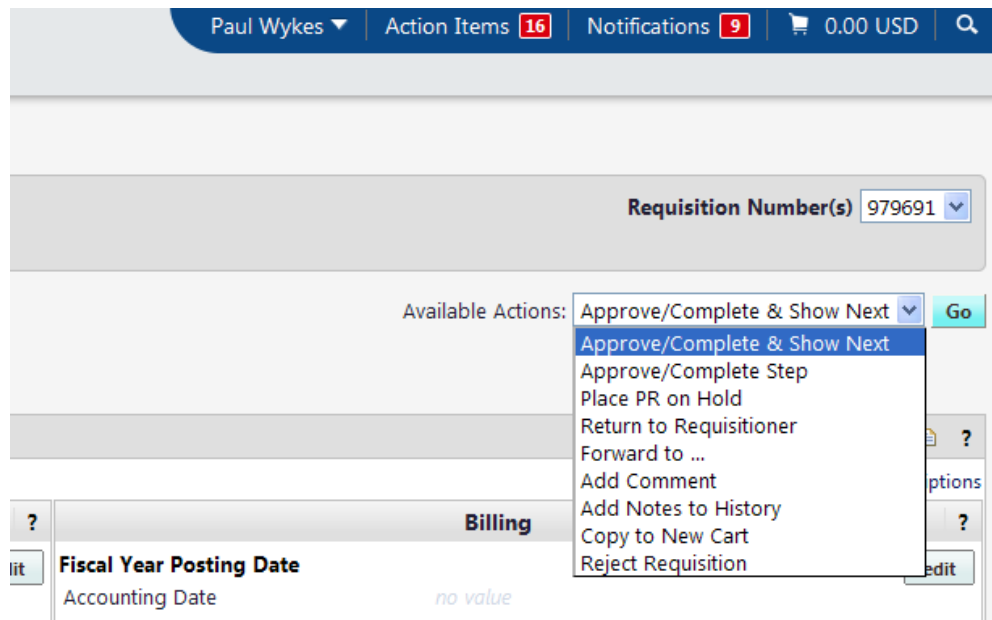
The screenshot displays the SmartBuy requisition review interface. At the top, the header includes the Clark University logo, 'SmartBuy plus', and 'Test Site'. The user is identified as Paul Wykes, with 16 Action Items and 9 Notifications. The currency is set to 0.00 USD.

The main content area is divided into several sections:

- Accounting Codes:** A table with columns for Fund, Organization, Account, Activity, and Location. The data row shows Fund 100PER (Operating budget fund), Organization 1231 (University police), and Account 7385 (Operating Supplies).
- Internal Notes and Attachments:** A section with an 'Internal Note' field and an 'Internal Attachments' section with an 'add attachment...' link. This section is circled in red.
- External Notes and Attachments:** A section with an 'External Note' field and an 'External Attachments' section with an 'add attachment...' link. The note content includes 'Note to all Suppliers' and 'Attachments for all suppliers'.
- Vendor / Line Item Details:** A section with a 'Vendor / Line Item Details' header, circled in red. It displays details for 'SHI International Corporation'. Below this, there is a table for 'Line(s): 1' with columns for Product Description, Catalog No, Size / Packaging, Unit Price, Quantity, and Ext. Price. The first line item is 'AutoCAD LT 2014 - New License' with a unit price of 938.00 and a quantity of 2 EA, resulting in an extended price of 1,876.00 USD.

# Available Actions

Once you have reviewed the requisition, you can view the options available to you by clicking on the down-arrow next to the “Available Options” dropdown box. See next page for an explanation of these steps.



The screenshot shows a web interface for requisition management. At the top, there is a navigation bar with the user name "Paul Wykes", "Action Items" with a red badge showing "16", "Notifications" with a red badge showing "9", and a shopping cart icon with "0.00 USD". Below this is a search bar. The main content area features a "Requisition Number(s)" dropdown menu set to "979691". Below the dropdown is the "Available Actions:" label, followed by a dropdown menu and a "Go" button. The dropdown menu is open, showing the following options: "Approve/Complete & Show Next" (highlighted), "Approve/Complete Step", "Place PR on Hold", "Return to Requisitioner", "Forward to ...", "Add Comment", "Add Notes to History", "Copy to New Cart", and "Reject Requisition". To the right of the dropdown menu, there are several buttons with question marks, including one labeled "Options" and another labeled "edit". Below the "Available Actions" section, there is a "Billing" section with a question mark icon. Under "Billing", there is a "Fiscal Year Posting Date" field with a question mark icon and a "no value" status. Below this is an "Accounting Date" field with a question mark icon.

# Taking Action

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While there are several actions available to you, the following are the ones you are most likely to need:

- > Approve/Complete – Select either of the Approve/Complete options to approve the requisition.
- > Return to Requisitioner – Select this to return the requisition. You will have the opportunity to leave a comment that the requisitioner will see. The requisitioner will be able to submit the requisition for approval again. Use this option if you need more information or changes to be made before granting approval.
- > Forward to ... - Use this to forward the requisition for someone else to approve.
- > Add Comment/Add Notes to History – Select to add a comment or notes to the requisition.
- > Reject Requisition – Selecting this will reject the requisition. The requisitioner will not be able to re-submit it. This option should be used rarely.

Once you have decided on an action step, click the blue “Go” button.



Please contact  
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if you have any  
questions.

