

SpendFile

The Review Process



New Workflow Request

New Workflow Request



SpendLogic <info@spendlogic.com>
To Karen Stein



Thu 1/11/2024 12:54 PM

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

SpendLogic

Hello from SpendLogic!

You have a new workflow request. Please check your [SpendLogic dashboard](#).

Details

Requester: John Smith

Email: john.smith@company.com

Type: Documentation Folder

PO#: ABCD-1234

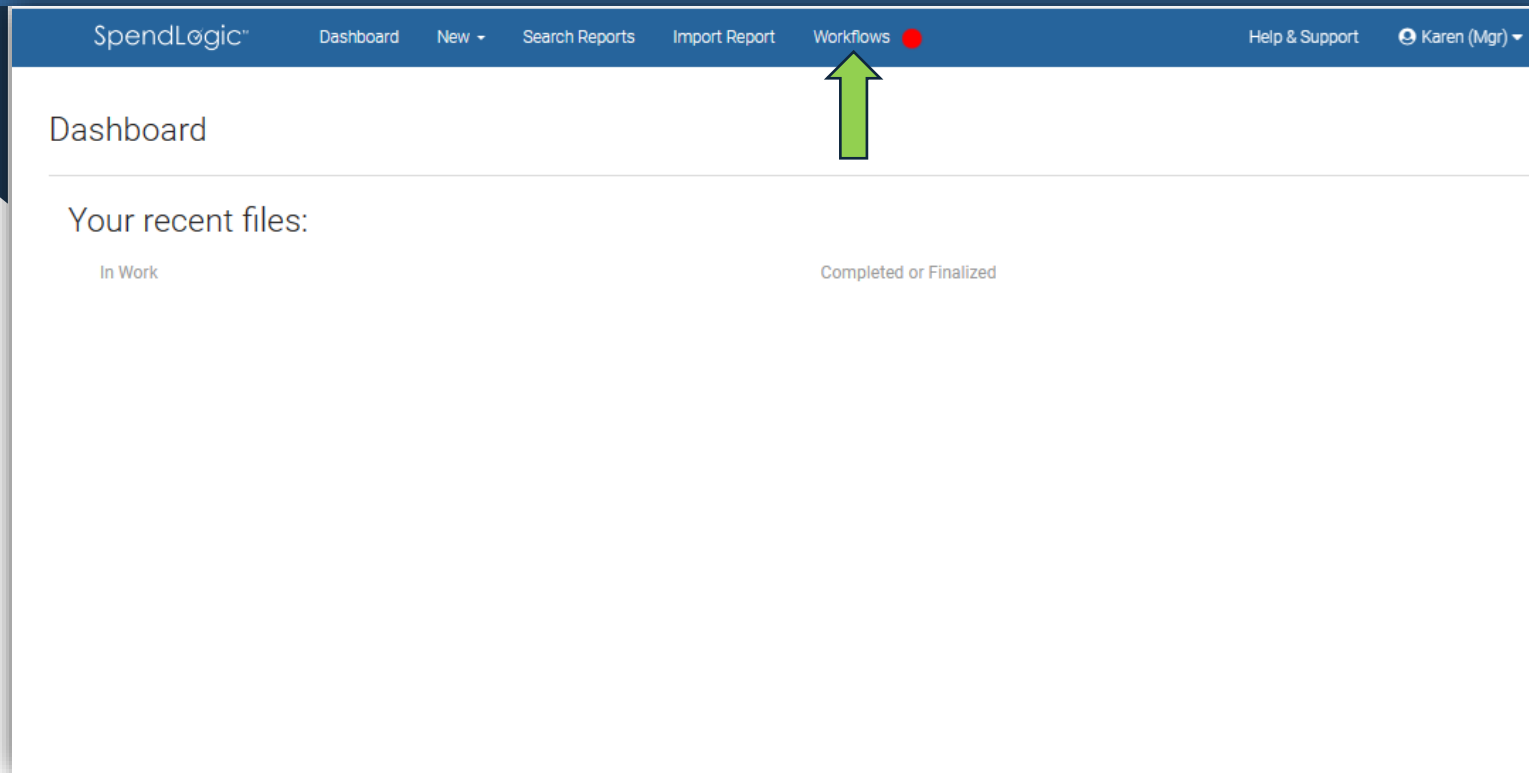
Supplier: Acme Co.



Requested Reviewer will receive an email.

Click on the hyperlink to be taken to your SpendLogic dashboard.

Click on Workflows (Red ●)



Click on Workflows




The Red ● indicates Reviewer has an active workflow needing attention.

Assigned to me; Incomplete

SpendLogic[™] Dashboard New Search Reports Import Report Workflows Help & Support Karen (Mgr)

Workflows

Assigned to me; Incomplete

PO# Supplier	Part#	Services	Requestor	Workflow Type	Date Requested	Request Age (Days)	Actions
Delete Me - Demo - 1 Acme Co (Testing Use ...			(USER), Karen	Documentation Folder	January 09, 2024	1	  

Requested by me; Incomplete

PO# Supplier	Part#	Services	Assigned To	Workflow Type	Date Requested	Request Age (Days)	Actions
No data available in table							

Requested by me; Completed, requires my action

PO# Supplier	Part#	Services	Assigned To	Workflow Type	Date Requested	Date Completed	Request Age (Days)	Actions
No data available in table								

Under “Assigned to me; Incomplete”, click the green edit pencil for the workflow you are completing.

Review Completed (green) blocks with Yellow Flags and any Left Side Entries with Yellow Flags

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(CO-01, Ceiling Value Increase) 01/11/2024

Did this order originate outside SpendLogic?
Yes

PO Number
Delete Me - Demo - 1

Supplier Name
Acme Co (Testing Use Only)

Contract
Test Contract

End Customer Type
Government Customer

Prime vs. Subcontract Holder
Prime

Delivery Order #
DO-001

Customer Name
Test Customer

Contract Description
Test Contract

Prime Contract Award Date
12/01/2023

Prime Contract Type
FAR 15 - Contract by negotiation







DPAS Rating
DO

Buyer Name
(USER) Karen


Manager Name
(MGR) Karen

Required

Pre-Award


- Purchase Requisition (PR)** Policy & Procedure Reference(s): Section 3.9 A PR is the initiation point to request the purchase of goods or services. Requesters are required to ensure the ... 
- Request for Quote/Proposal (RFQ/RFP)** Policy & Procedure Reference(s): Refer to Section 4.0, Request for Quotes/Proposals for additional guidance. A written RFQ is normally applicable for supply ... 
- Supplier Quote/Proposal & Supporting Documentation/Written No Bid** Summary: Upload supplier proposal/quote/no bid and any supporting documentation that an auditor or reviewer would require in order to understand the quote. ... 
- Draft (DPAS Rated) Purchase Order/Subcontract Agreement/Change Order, etc.** Policy & Procedure Reference: See Section 4.2.7 for additional guidance Upload DPAS Rated award being issued to supplier/subcontractor. Procurement Personnel ... 
- Prior Consent to Subcontract and Advance Notification** Policy & Procedure Reference(s): Refer to Section 6.1, Prior Consent and Advance Notification for additional guidance. Advanced notification and consent to ... 
- Price Analysis Under Micro-Purchase Threshold** Provide a summary to support price paid 

Post-Award

- Fully Executed PO/Blanket Order/Subcontract Agreement/Change Order (DPAS Rated)** Upload Fully Executed award and check whether supplier accepted or rejected DPAS rating. DPAS rated orders must be accepted or rejected in writing, or in ... 

Review for applicability, include if needed

Pre-Award

- Buy American - Trade Agreements** Buyers shall procure items from domestically manufactured and owned business when possible. CCG is required to deliver only domestic end products to the ... 

Purchase Requisition (PR)

Policy & Procedure Reference(s): Section 3.9 A PR is the initiation point to request the purchase of goods or services. Requesters are required to ensure the PR contains adequate description of the requirement(s) documenting the need for the goods or services. PRs must be approved by the program manager or designee. The approved PR provides the Buyer with authorization to proceed with the procurement. Unless specifically directed by Senior Management, Buyer shall not issue an award without a pre-approved PR

PR Required?
YES

Upload PR and Approval
Drop files to upload or
Purchase Req.docx 30.66 KB
+ Add files...

Compliance review requirements:

- Confirm Requisition and Approval are attached
- If no PR, is explanation in accordance with company policies and procedures?

Reviewer 1 Comments (karen-chameleon-mgr@spendlogic.com):

Author Comments:

Save

How to complete a review

- Reviewers will confirm the package satisfies the Compliance Review Requirements by clicking the Flag to **Green**.
- Note: If a compliance requirement does not apply, click the flag **Green**.
- If a compliance requirement is not satisfied or the reviewer finds issue with any of the information contained in the folder, reviewer shall click the flag **Red** and add a comment for the Buyer.
- All Compliance Review Requirements flags must be marked either **Green** or **Red**.
- Click “Save” and move to the next Green folder with a **Yellow** flag.
- If you don’t click “Save”, your review of that folder will not be complete.

Purchase Requisition (PR)

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PR Required?

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Upload PR and Approval

Drop files to upload or

+ Add files...

Purchase Req.docx 30.66 KB

Compliance review requirements:

Confirm Requisition and Approval are attached

If no PR, is explanation in accordance with company policies and procedures?

Reviewer 1 Comments (karen-chameleon-mgr@spendlogic.com):

Missing PR approval.


Author Comments:

Save

Click the flag to change from green to red

DON'T FORGET ABOUT LEFT SIDE REVIEW FLAGS

\$1.00

Prior Ceiling Value ⓘ 

\$1.00

Net Ceiling Value Change ⓘ


\$2,000.00

Total Ceiling Value Change ⓘ

\$2,000.00

PO Date ⓘ

01/08/2024

New Ceiling Value 

\$2,001.00

Prior Ceiling Value x

Current Input: \$1.00

Compliance review requirements:

- ☐ Ensure PO Amount does not exceed Ceiling Value.

Reviewer 1 Comments (karen-chameleon-mgr@spendlogic.com):

Author Comments:

Remove Save

New Ceiling Value x

Current Input: \$2,001.00

Compliance review requirements:

- ☑ Ensure PO Amount does not exceed Ceiling Value.
- ☑ Ensure Ceiling Value does not exceed proposed value

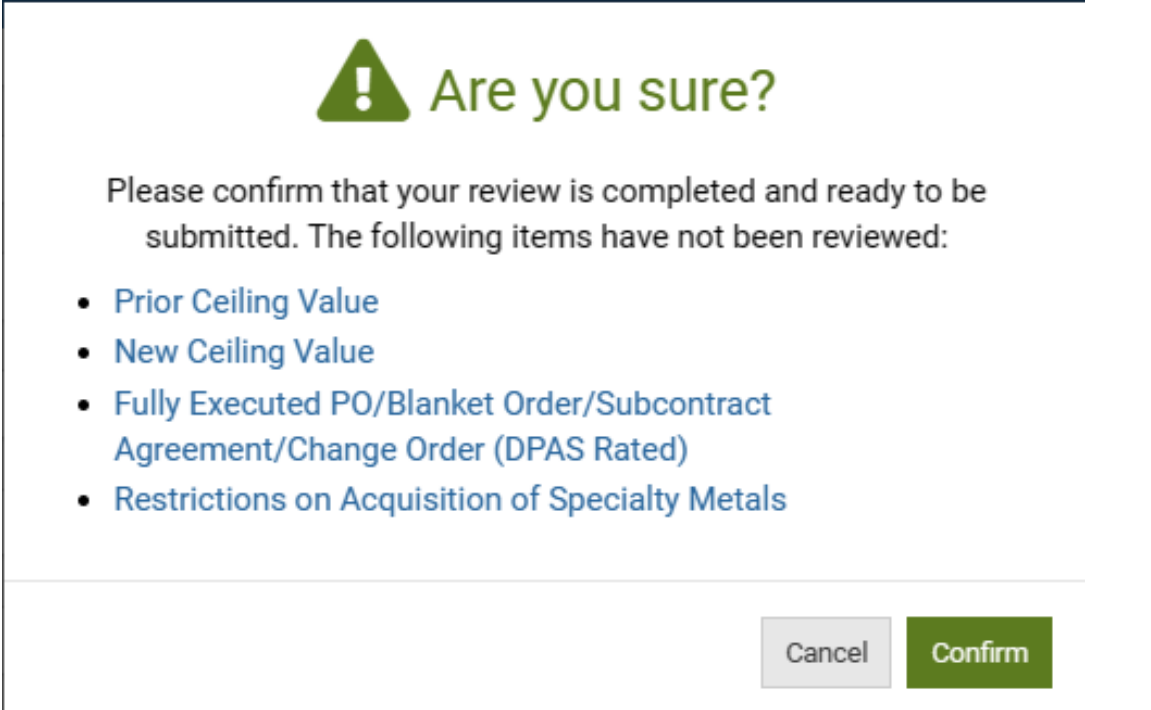
Reviewer 1 Comments (karen-chameleon-mgr@spendlogic.com):


Author Comments:

Remove Save

Click “Submit” to return package to User

- When you have completed your review (*or think you have completed your review*) click “Submit” at the bottom of the package.
- The system will notify you if you have missed any Left and/or Right-Side entries with yellow flags.



 **Are you sure?**

Please confirm that your review is completed and ready to be submitted. The following items have not been reviewed:

- [Prior Ceiling Value](#)
- [New Ceiling Value](#)
- [Fully Executed PO/Blanket Order/Subcontract Agreement/Change Order \(DPAS Rated\)](#)
- [Restrictions on Acquisition of Specialty Metals](#)

Tip: Folders with no Yellow Flags do not have review requirements.

Workflow Dashboard (Post Review)

SpendLogic™ Dashboard New ▾ Search Reports Import Report Workflows Help & Support Karen (Mgr) ▾

Workflows

Assigned to me; Incomplete

PO#	Supplier	Part#	Services	Requestor	Workflow Type	Date Requested	Request Age (Days)	Actions
No data available in table								

Requested by me; Incomplete

PO#	Supplier	Part#	Services	Assigned To	Workflow Type	Date Requested	Request Age (Days)	Actions
No data available in table								

Requested by me; Completed, requires my action

PO#	Supplier	Part#	Services	Assigned To	Workflow Type	Date Requested	Date Completed	Request Age (Days)	Actions
No data available in table									

If you have completed your review and clicked "Submit", the package will either be returned to the Buyer OR automatically routed to the next reviewer.

You will see that package is no longer in your queue.