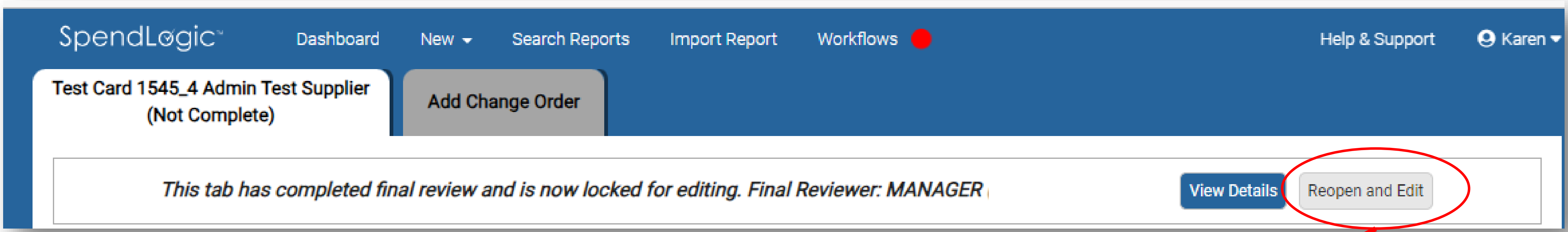
Reopen and Edit an Approved/Locked Documentation Folder

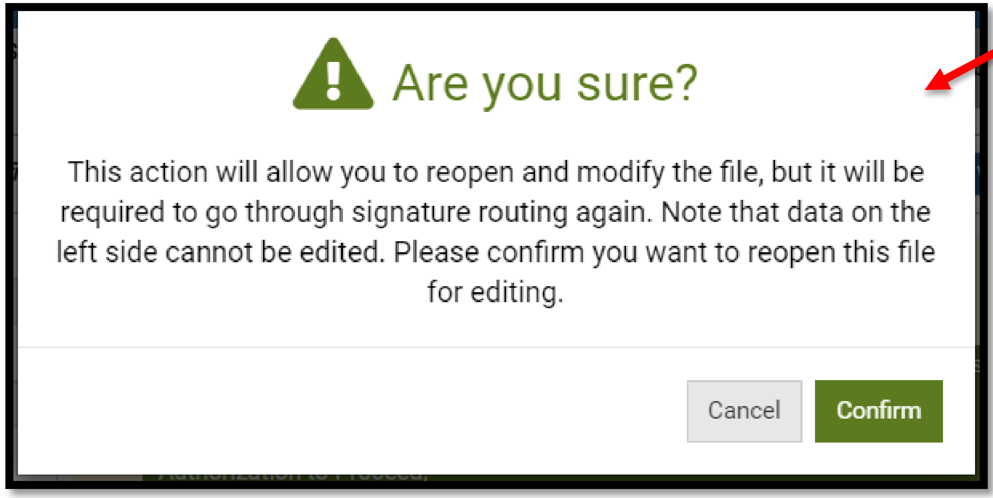
The Buyer

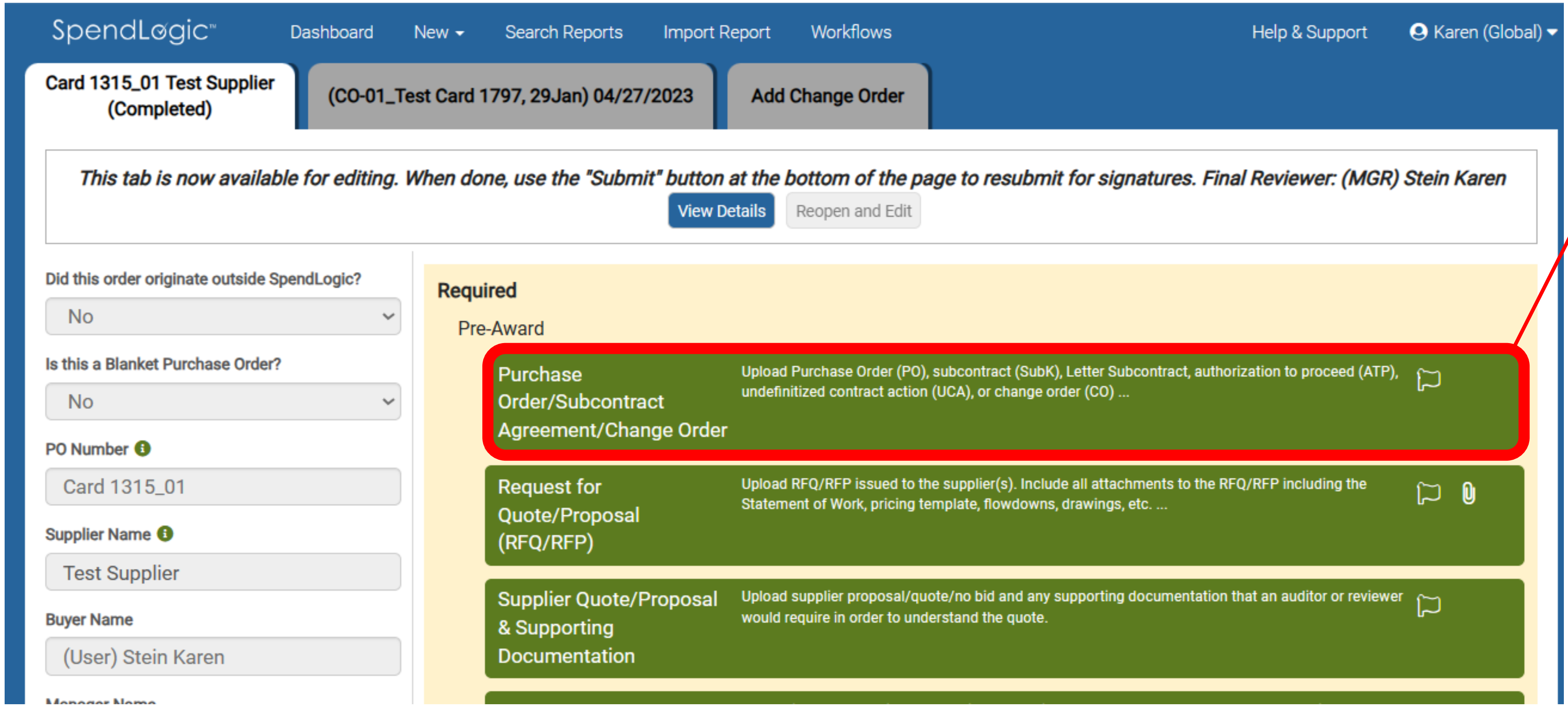


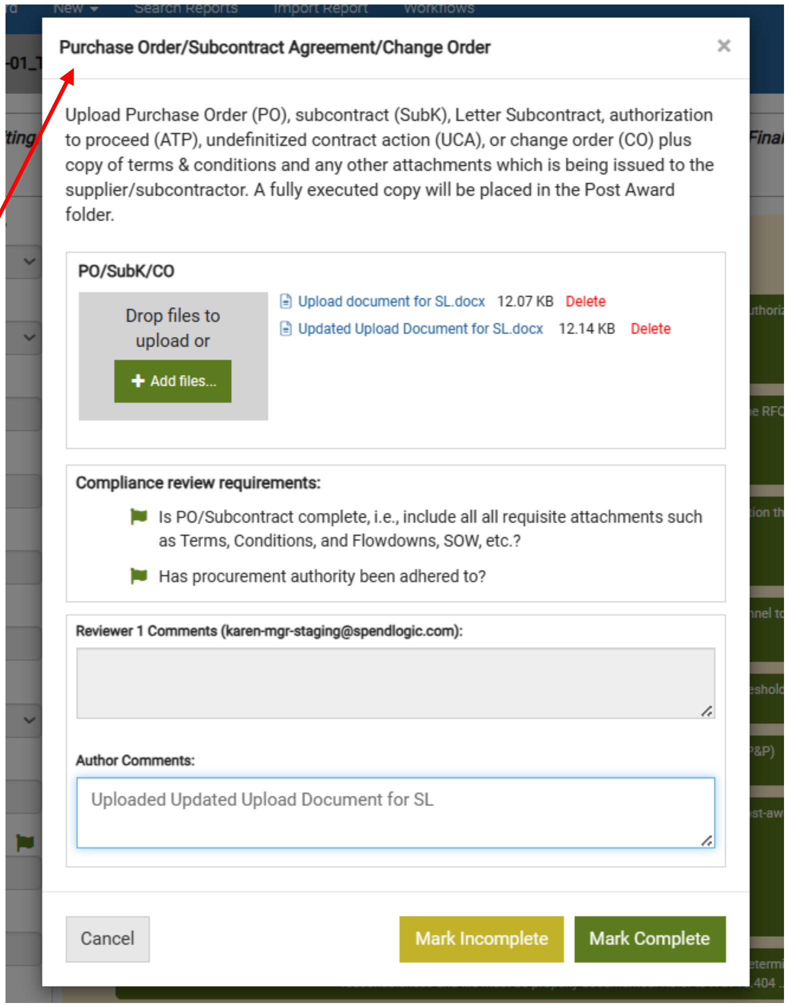
Buyer will locate the PO Package requiring attention.

Buyer will navigate to the tab (i.e., award tab or a change order) and click on "Reopen and Edit".

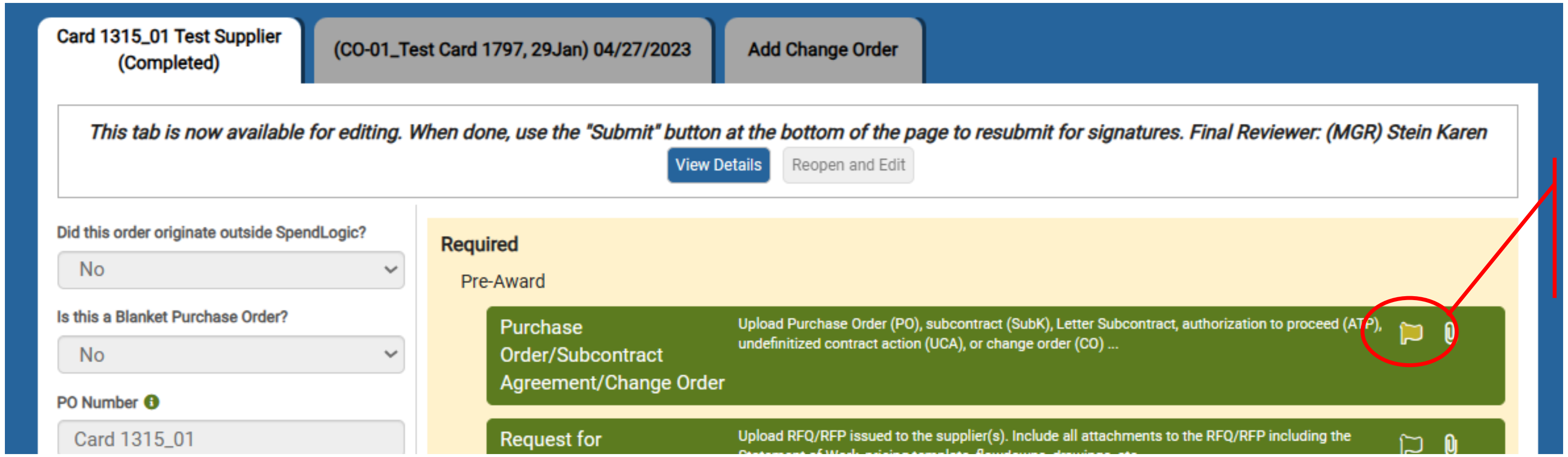
NOTE: Each tab will have its own banner. Be sure to reopen and edit the correct tab.







> Click on the folder(s) requiring a change
> Make your changes
> Author Comments provide further explanation to the reviewer (not required but highly recommended)
> Mark Complete



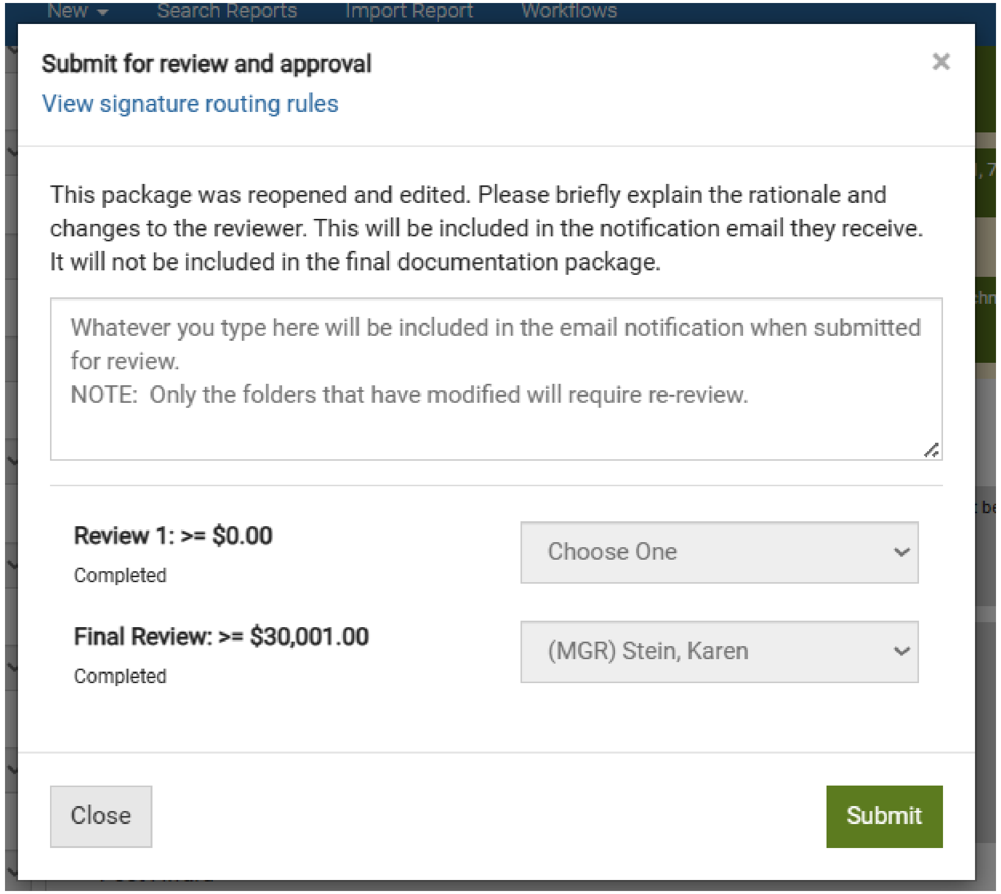
Note the flag that was previously green is now yellow.

When you click "Submit" your Re-opened and Edited package, you will be prompted to provide a brief explanation for the edit.

Whatever you type here will be displayed in the email notification received by the Reviewers.

Reviewers will only be required to review the Edited folders and not the entire package.

They will follow the same review process by ensuring all compliance review flags are green (or red if there are issues), Save, and then Submit.



The Reviewer

Reviewer will receive Workflow email that includes explanation

New Workflow Request

SpendLogic <info@spendlogic.com>
To Karen Stein

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: Karen (User) Stein

Email: karen-user-staging@spendlogic.com

Type: Documentation Folder

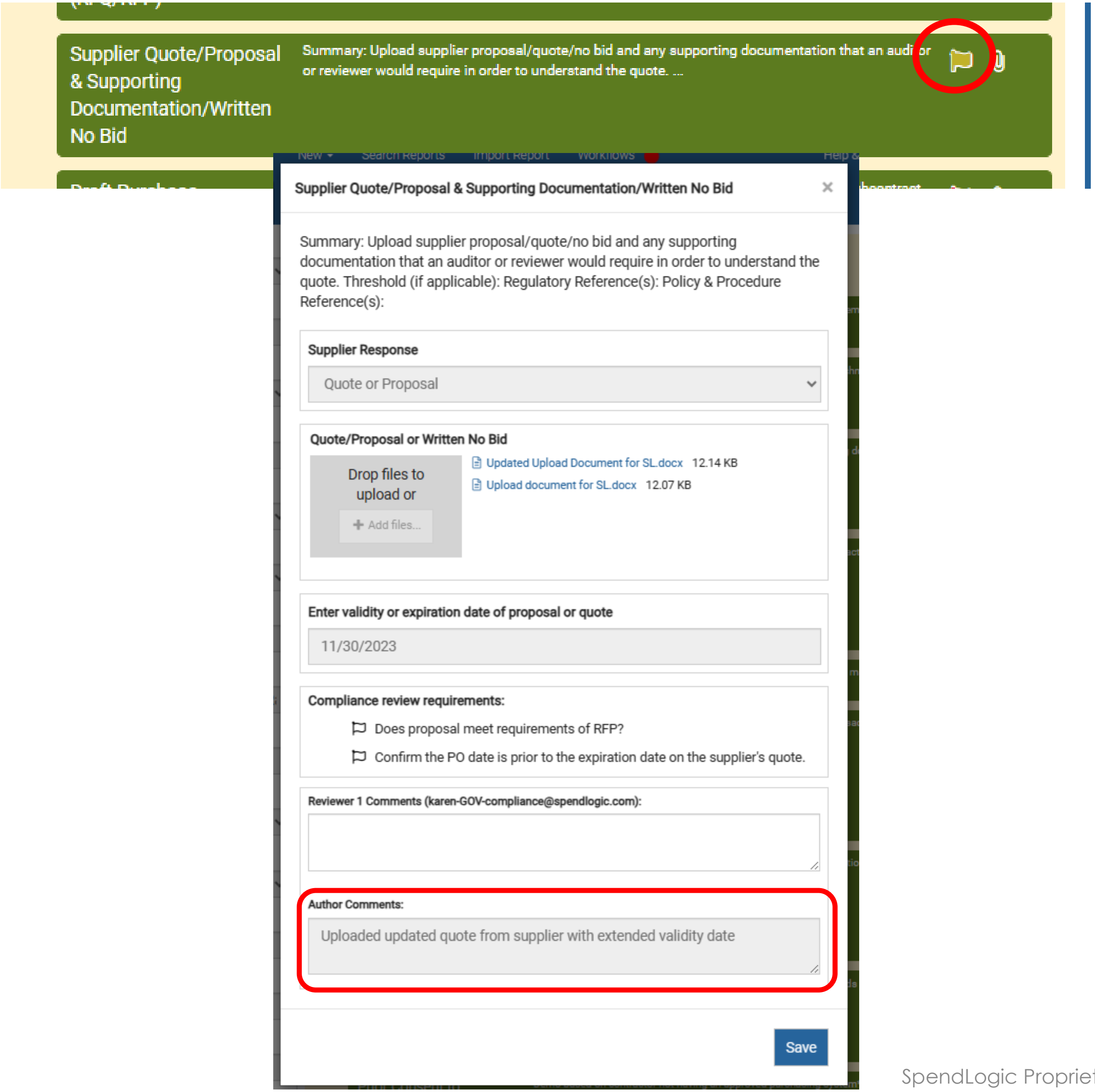
PO#: Card 1315_01

Supplier: Test Supplier

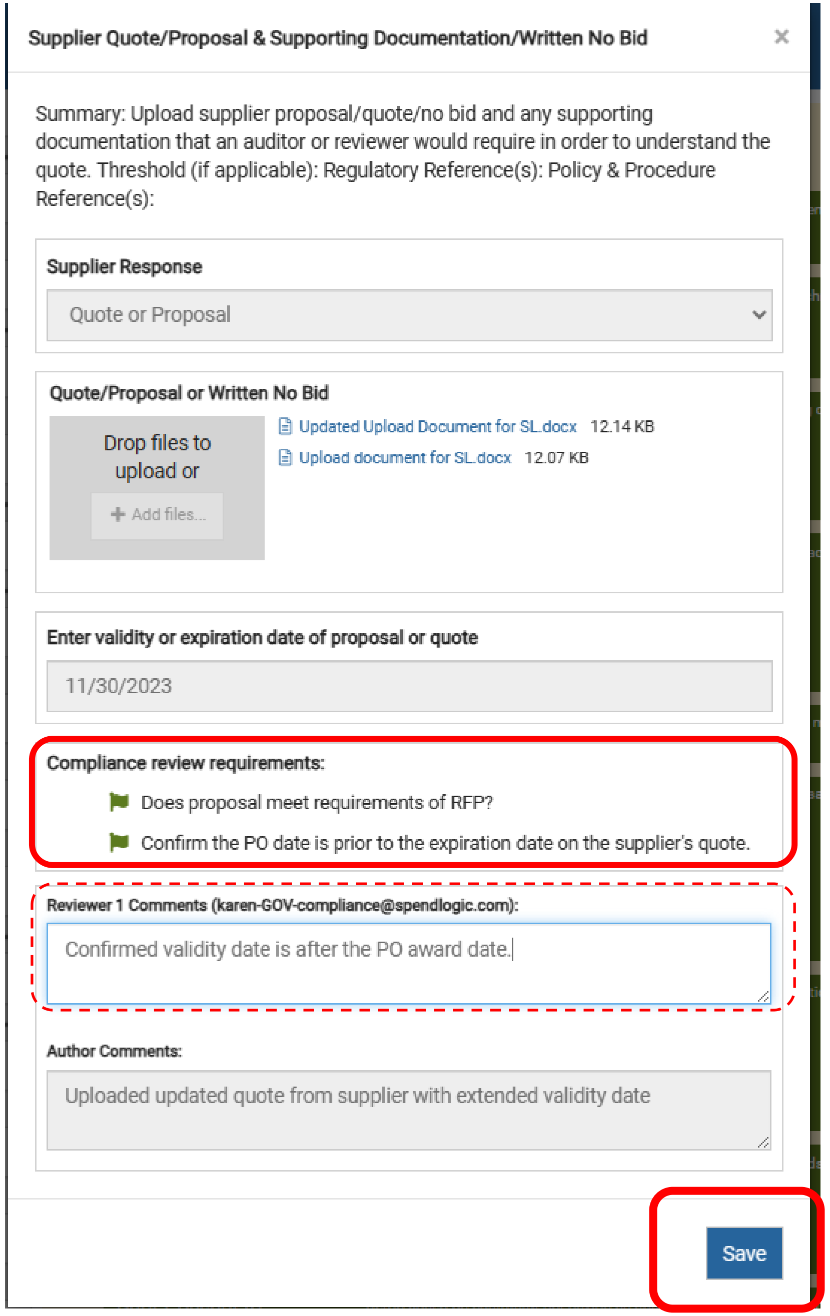
Message: Inadvertently attached un-dated Reps & Certs. Uploaded dated copy.

Reviewer will click on the hyperlink in the email to be taken to their Workflow dashboard.

- Reviewer will open the DF from their Workflow Dashboard.
- For any Yellow flag on the Right Hand folder, reviewer will need to review.
- *NOTE: Reviewer need only re-review the folders with yellow flags. They do not have to re-review the entire package.*
- Comments from Buyer, if any, will appear in "Author Comments". This will help explain to the Reviewer what they're looking for.

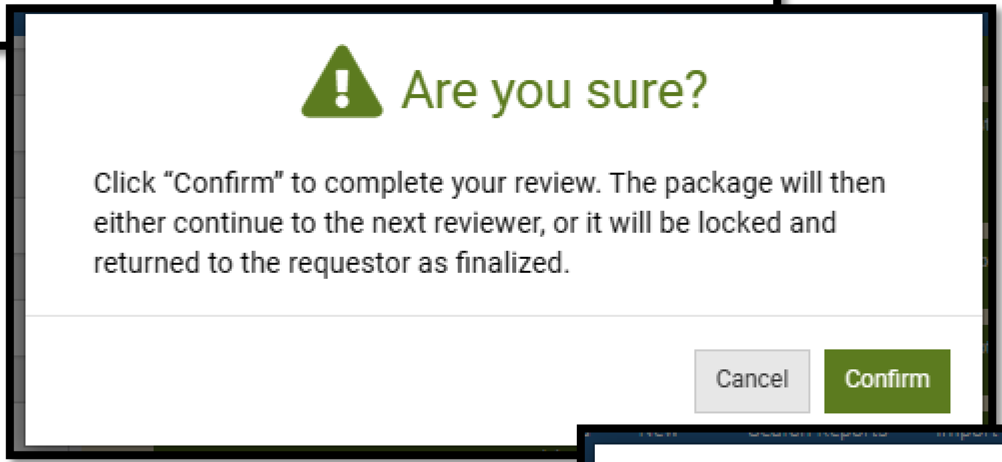


- Reviewer will mark the compliance flags as appropriate (RED or GREEN) (refer to *How to Complete a Review* found under Help & Resources).
- Reviewer may, but it is not required, add any Comments.
- Once complete, click "Save".
- Move on to next yellow flag (if any).

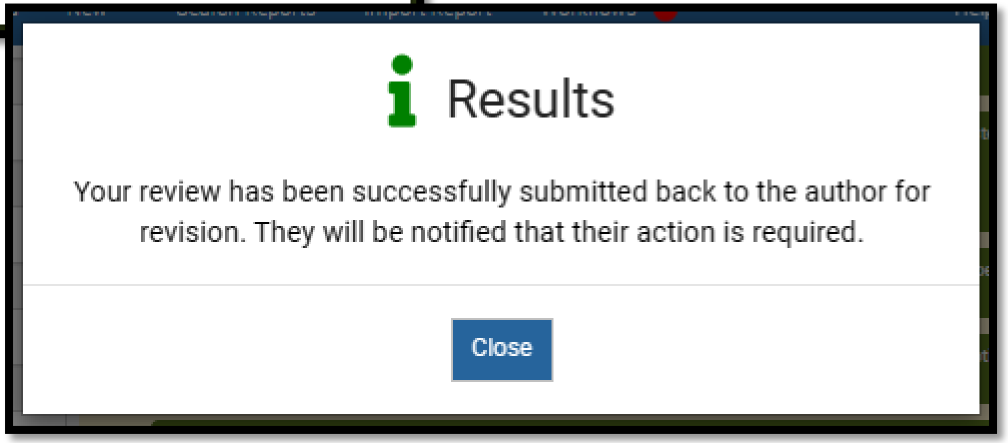


When Re-Review is complete…

1. Click “Submit”



2. Click “Confirm”



3. Click “Close”

Back to Workflows Dashboard

You will be taken back to Dashboard after you submit.

If you have no other reviews, click on your user name, then Logout.