

# Reopen and Edit an Approved/Locked Documentation Folder



# The Buyer



SpendLogic™ Dashboard New ▾ Search Reports Import Report Workflows ● Help & Support Karen ▾


Test Card 1545\_4 Admin Test Supplier (Not Complete) Add Change Order

*This tab has completed final review and is now locked for editing. Final Reviewer: MANAGER* View Details Reopen and Edit

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.

 Are you sure?

This action will allow you to reopen and modify the file, but it will be required to go through signature routing again. Note that data on the left side cannot be edited. Please confirm you want to reopen this file for editing.

Cancel Confirm

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

Card 1315\_01 Test Supplier (Completed) (CO-01\_Test Card 1797, 29Jan) 04/27/2023 Add Change Order

*This tab is now available for editing. When done, use the "Submit" button at the bottom of the page to resubmit for signatures. Final Reviewer: (MGR) Stein Karen*

View Details Reopen and Edit

Did this order originate outside SpendLogic?  
No

Is this a Blanket Purchase Order?  
No

PO Number  
Card 1315\_01

Supplier Name  
Test Supplier

Buyer Name  
(User) Stein Karen

Manager Name

**Required**

Pre-Award

<b>Purchase Order/Subcontract Agreement/Change Order</b>	Upload Purchase Order (PO), subcontract (SubK), Letter Subcontract, authorization to proceed (ATP), undefinitized contract action (UCA), or change order (CO) ...	
<b>Request for Quote/Proposal (RFQ/RFP)</b>	Upload RFQ/RFP issued to the supplier(s). Include all attachments to the RFQ/RFP including the Statement of Work, pricing template, flowdowns, drawings, etc. ...	
<b>Supplier Quote/Proposal &amp; Supporting Documentation</b>	Upload supplier proposal/quote/no bid and any supporting documentation that an auditor or reviewer would require in order to understand the quote.	

**Purchase Order/Subcontract Agreement/Change Order**

Upload Purchase Order (PO), subcontract (SubK), Letter Subcontract, authorization to proceed (ATP), undefinitized contract action (UCA), or change order (CO) plus copy of terms & conditions and any other attachments which is being issued to the supplier/subcontractor. A fully executed copy will be placed in the Post Award folder.

**PO/SubK/CO**

Drop files to upload or  
+ Add files...

Upload document for SL.docx 12.07 KB Delete  
Updated Upload Document for SL.docx 12.14 KB Delete

**Compliance review requirements:**

- Is PO/Subcontract complete, i.e., include all requisite attachments such as Terms, Conditions, and Flowdowns, SOW, etc.?
- Has procurement authority been adhered to?

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

**Author Comments:**  
Uploaded Updated Upload Document for SL

Cancel Mark Incomplete Mark Complete

- > 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

Card 1315\_01 Test Supplier (Completed) (CO-01\_Test Card 1797, 29Jan) 04/27/2023 Add Change Order

*This tab is now available for editing. When done, use the "Submit" button at the bottom of the page to resubmit for signatures. Final Reviewer: (MGR) Stein Karen*



View Details Reopen and Edit



Did this order originate outside SpendLogic? No

Is this a Blanket Purchase Order? No

PO Number Card 1315\_01

**Required**  
Pre-Award

**Purchase Order/Subcontract Agreement/Change Order** Upload Purchase Order (PO), subcontract (SubK), Letter Subcontract, authorization to proceed (ATP), undefinitized contract action (UCA), or change order (CO) ...  

**Request for** Upload RFQ/RFP issued to the supplier(s). Include all attachments to the RFQ/RFP including the Statement of Work, pricing template, drawings, drawings etc.  

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.

New Search Reports Import Report Workflows

**Submit for review and approval** ×

[View signature routing rules](#)

This package was reopened and edited. Please briefly explain the rationale and changes to the reviewer. This will be included in the notification email they receive. It will not be included in the final documentation package.

Whatever you type here will be included in the email notification when submitted for review.  
NOTE: Only the folders that have modified will require re-review.

**Review 1: >= \$0.00** Completed Choose One

**Final Review: >= \$30,001.00** Completed (MGR) Stein, Karen

Close 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

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**Hello from SpendLogic!**

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

**Details**

**Requester:** Karen (User) Stein

**Email:** [karen-user-staging@spendlogic.com](mailto:karen-user-staging@spendlogic.com)



**Type:** Documentation Folder

**PO#:** Card 1315\_01

**Supplier:** Test Supplier

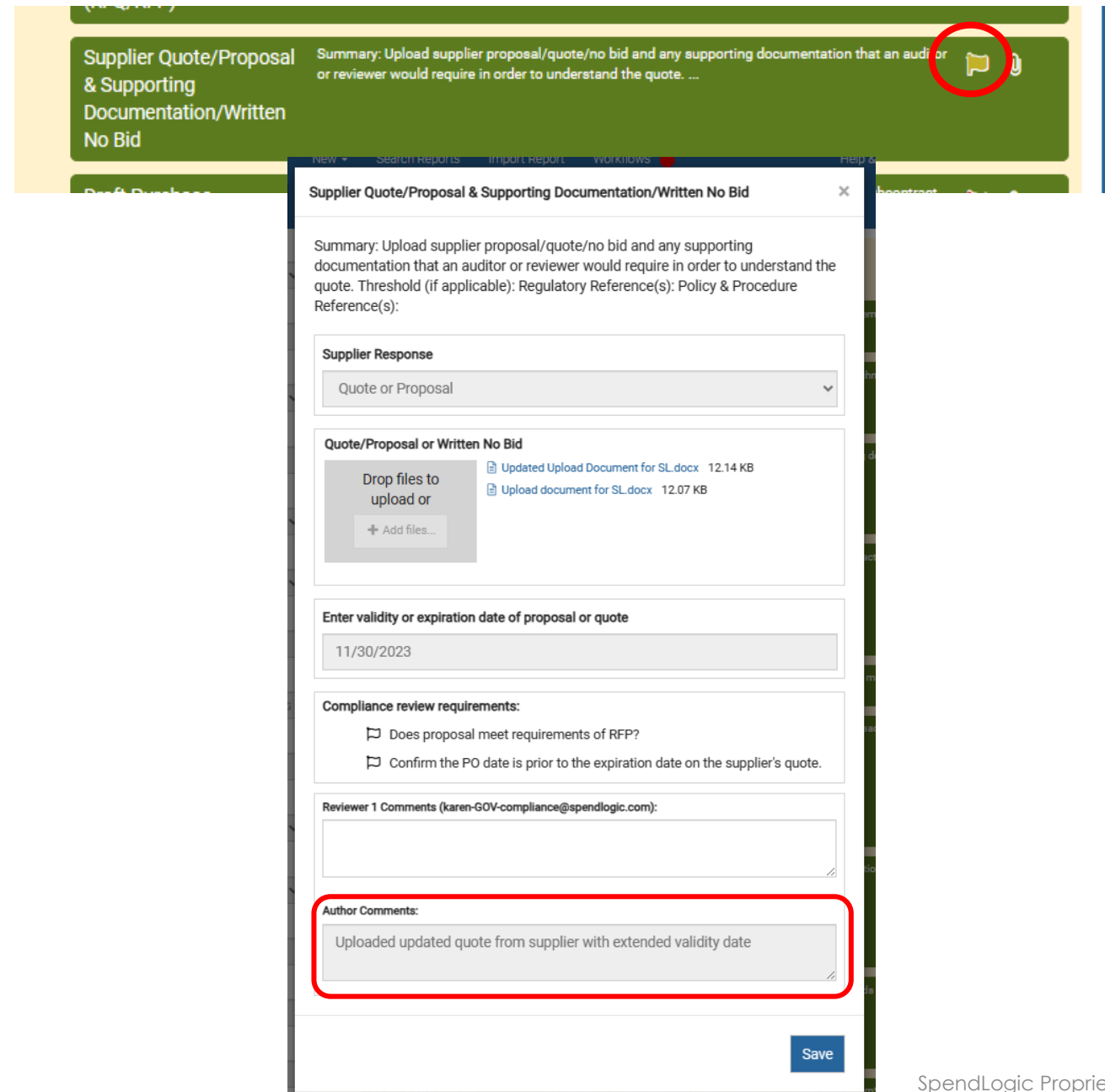
**Message:** Inadvertently attached un-dated Reps & Certs. Uploaded dated copy.

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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).

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. Threshold (if applicable): Regulatory Reference(s): Policy & Procedure Reference(s):

Supplier Response

Quote or Proposal

Quote/Proposal or Written No Bid

Drop files to upload or

+ Add files...

Updated Upload Document for SL.docx 12.14 KB

Upload document for SL.docx 12.07 KB

Enter validity or expiration date of proposal or quote

11/30/2023

Compliance review requirements:

- Does proposal meet requirements of RFP?
- Confirm the PO date is prior to the expiration date on the supplier's quote.

Reviewer 1 Comments (karen-GOV-compliance@spendlogic.com):

Confirmed validity date is after the PO award date.

Author Comments:

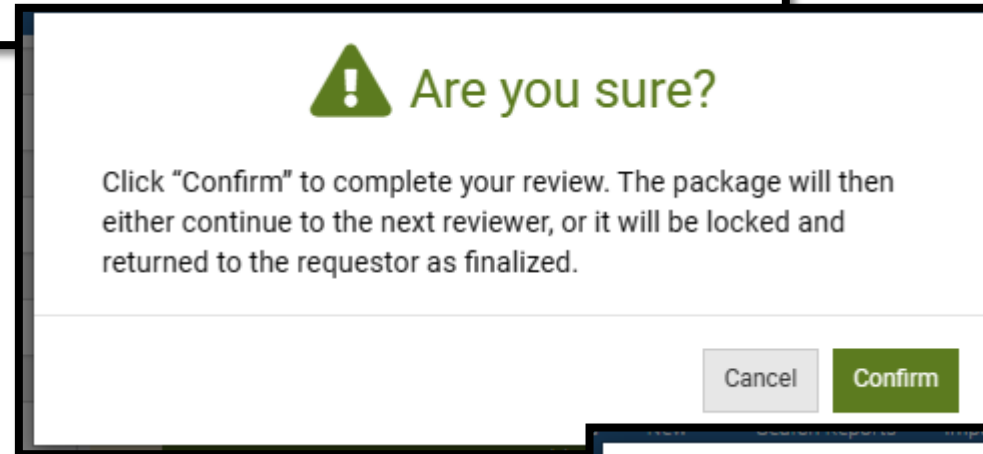
Uploaded updated quote from supplier with extended validity date

Save

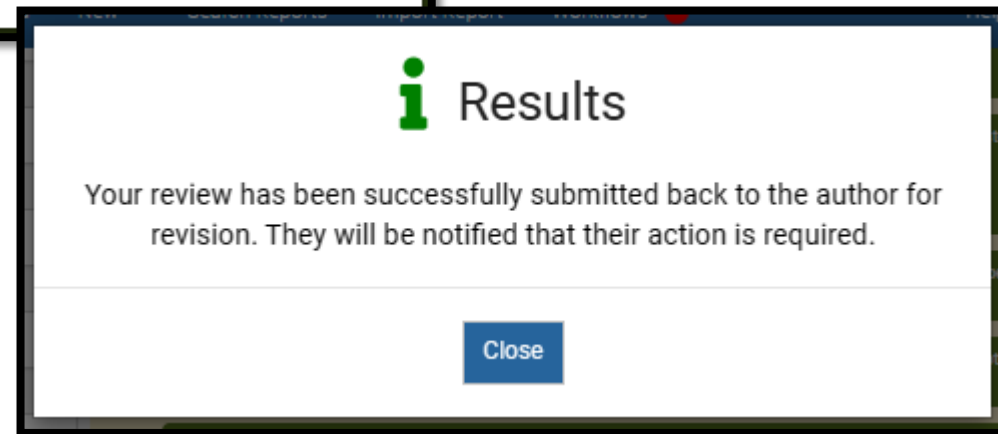
# When Re-Review is complete...



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.

The screenshot shows the SpendLogic Workflows dashboard. At the top, there is a navigation bar with the SpendLogic logo, a 'Workflows' tab, and a user profile dropdown for 'Karen (Demo Compliance)'. The dropdown menu includes options for Profile, Metrics, Create CPSR Report, and Logout. A yellow arrow points to the Logout option.

Below the navigation bar, there are three sections of workflow data:

- Assigned to me; Incomplete**: A table with columns for PO# Supplier, Part#, Services, Requestor, Workflow Type, Date Requested, and Request Age (Days). It lists five workflow items, each with a green checkmark icon and a yellow arrow pointing to the Logout option in the user menu.
- Requested by me; Incomplete**: A table with columns for PO# Supplier, Part#, Services, Assigned To, Workflow Type, Date Requested, Request Age (Days), and Actions. It displays 'No data available in table'.
- Requested by me; Completed, requires my action**: A table with columns for PO# Supplier, Part#, Services, Assigned To, Workflow Type, Date Requested, Date Completed, Request Age (Days), and Actions. It also displays 'No data available in table'.