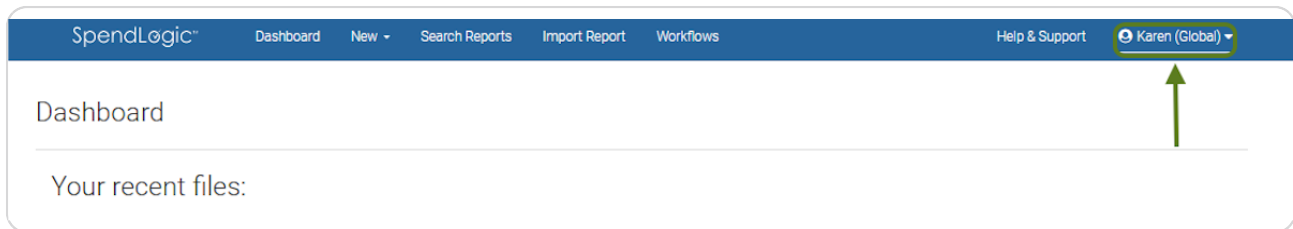


Log into SpendLogic

6 Steps

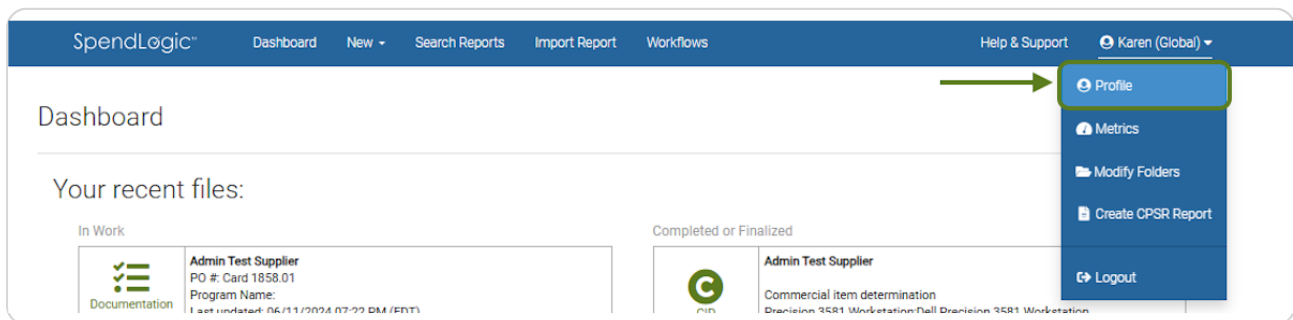
STEP 1

Click on your Name in the upper right corner of the SpendLogic tool bar.



STEP 2

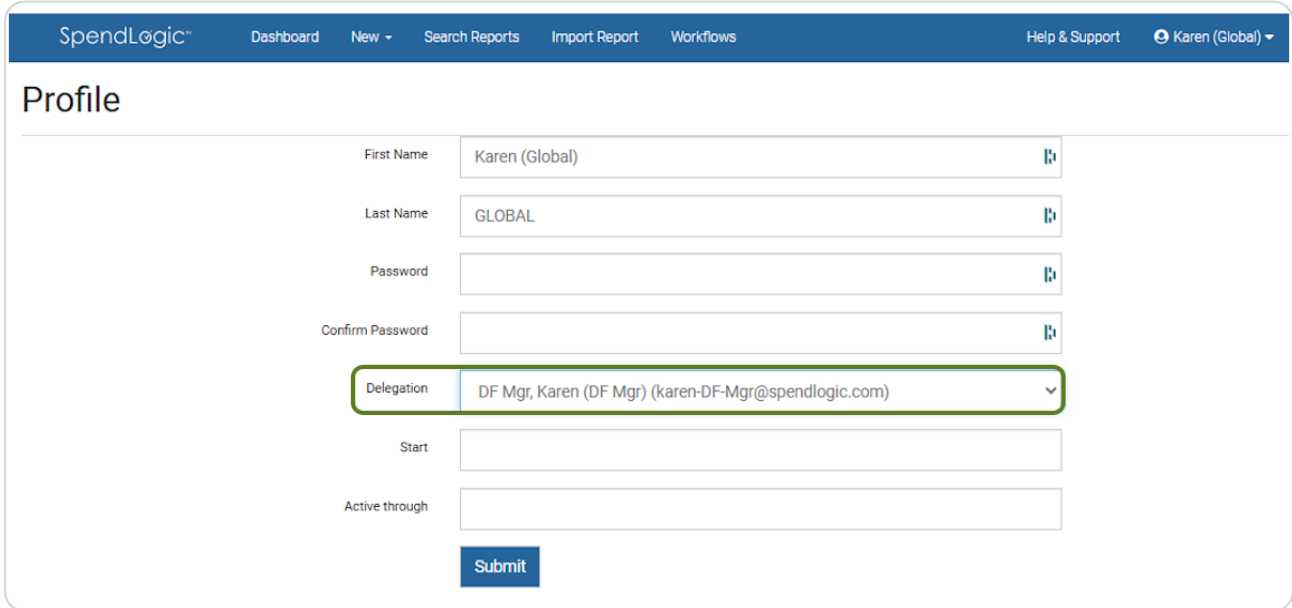
Select Profile



STEP 3

Navigate to "Delegation" and select the User from the drop down to whom you are delegating your review authority.

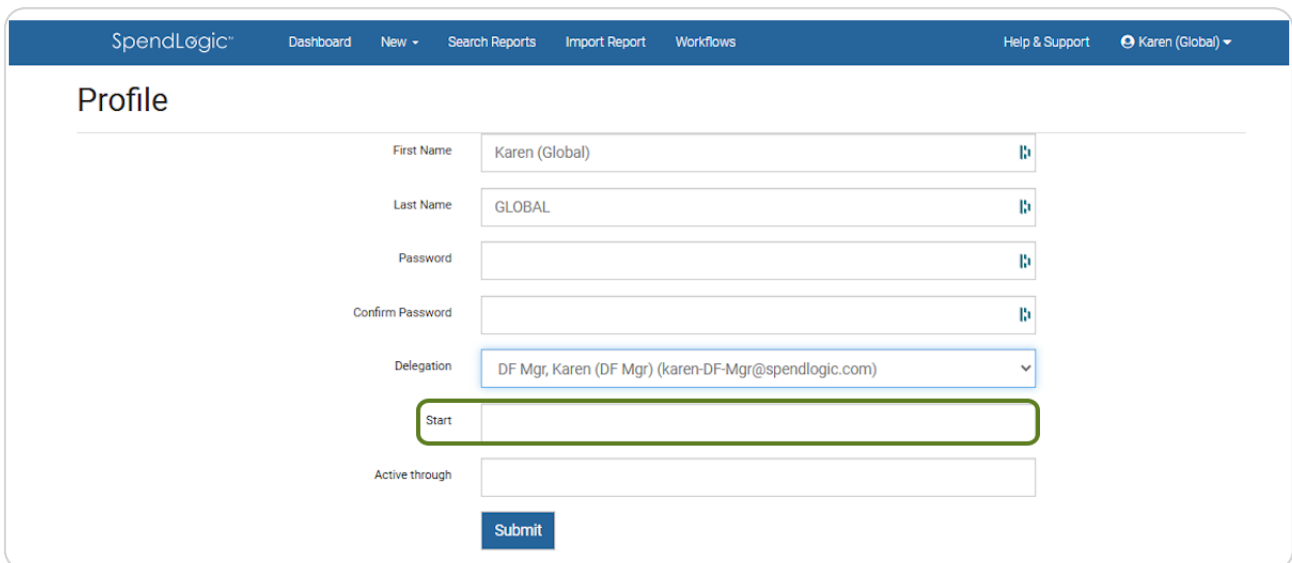
NOTE: Your delegation should align with your company's policy on delegation of authority/responsibility.



The screenshot shows the 'Profile' page in the SpendLogic application. The navigation bar at the top includes 'SpendLogic', 'Dashboard', 'New', 'Search Reports', 'Import Report', 'Workflows', 'Help & Support', and a user profile for 'Karen (Global)'. The 'Profile' section contains several input fields: 'First Name' (Karen (Global)), 'Last Name' (GLOBAL), 'Password', 'Confirm Password', 'Delegation' (a dropdown menu with 'DF Mgr, Karen (DF Mgr) (karen-DF-Mgr@spendlogic.com)' selected), 'Start', and 'Active through'. A blue 'Submit' button is located at the bottom. The 'Delegation' dropdown menu is highlighted with a green border.

STEP 4

Start Date: Enter the date the delegation should commence.



The screenshot shows the 'Profile' page in the SpendLogic application, identical to the previous one. The 'Start' input field is highlighted with a green border, indicating where the user should enter the date the delegation should commence.

STEP 5

Active Through: Enter the date the delegation should end.

The screenshot shows the 'Profile' page in the SpendLogic application. The navigation bar at the top includes 'SpendLogic', 'Dashboard', 'New', 'Search Reports', 'Import Report', 'Workflows', 'Help & Support', and a user profile for 'Karen (Global)'. The form fields are: 'First Name' (Karen (Global)), 'Last Name' (GLOBAL), 'Password', 'Confirm Password', 'Delegation' (DF Mgr, Karen (DF Mgr) (karen-DF-Mgr@spendlogic.com)), 'Start' (06/18/2024), and 'Active through' (empty). A green box highlights the 'Active through' field, and a blue 'Submit' button is located below it.

STEP 6

Click on Submit to affect the delegation.

This screenshot is identical to the previous one, but the 'Active through' field now contains the date '06/25/2024'. A green arrow points to the blue 'Submit' button, which is also highlighted with a green box.

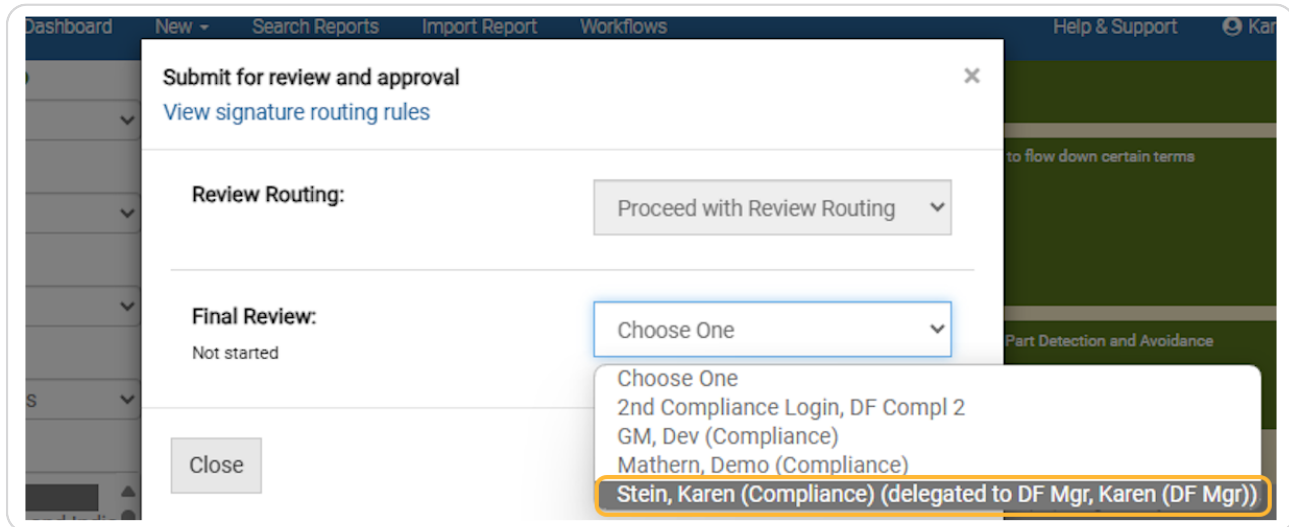
WHAT WILL THE USER SEE?

1 Step

When the User has completed a Documentation Folder, they will Submit for review as normal.

STEP 7

If a Delegation is active, the User will see both the Delegator's Name and the Delegatee's Name in the drop down.



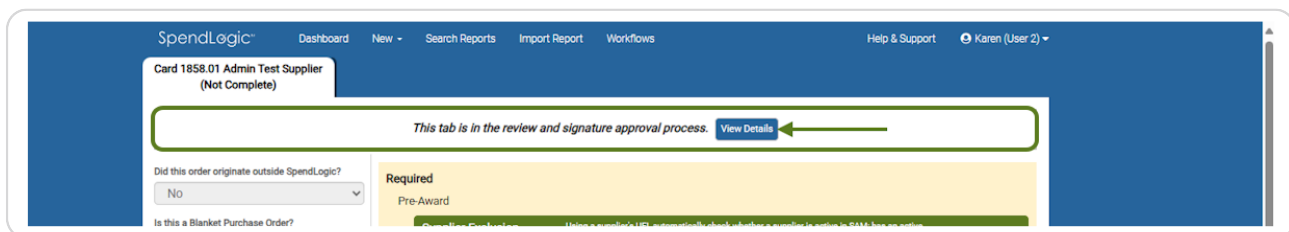
VIEW DETAILS

2 Steps

Anyone, including the User, who can view a Documentation Folder can see whether the review has been delegated.

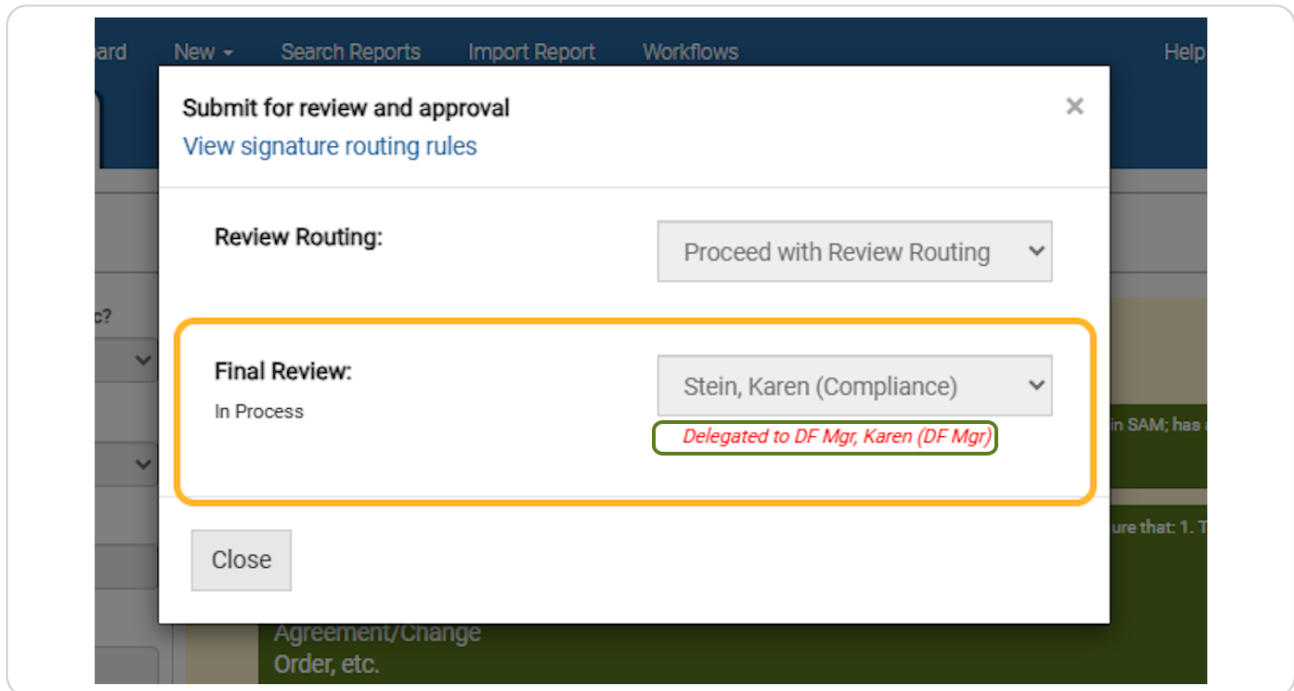
STEP 8

Click on View Details



STEP 9

View Details will show to whom the review is assigned as well as to whom it is delegated.



DELEGATOR WORKFLOW

3 Steps

The reviewer will have the review request appear in their workflow since the review request is to the reviewer yet is delegated to another review.

STEP 10

Click on Workflows

The screenshot shows the SpendLogic interface with the 'Workflows' tab selected in the top navigation bar. The main content area is titled 'Workflows' and contains three filterable sections. The first section, 'Assigned to me; Incomplete', is highlighted with an orange box and contains a table with two rows of workflow data. The second section, 'Requested by me; Incomplete', and the third section, 'Requested by me; Completed, requires my action', both show 'No data available in table'.

PO#	Supplier	Part#	Services	Requestor	Workflow Type	Date Requested	Request Age (Days)	Actions
Card 1858.01	Admin Test Supplier			GLOBAL, Karen (Global)	Documentation Folder	June 18, 2024	1	
Card 1693-\$700k	Admin			DF User 2, Karen (User 2)	Documentation Folder	October 27, 2023	235	

STEP 11

WORKFLOW | DELEGATEE

The person to whom a review has been delegated will see a requested review in a new "Delegated to me; Incomplete" section in their Workflows.

The screenshot shows the SpendLogic Workflows page. The top navigation bar includes "SpendLogic", "Dashboard", "New", "Search Reports", "Import Report", "Workflows" (highlighted with a red dot), "Help & Support", and a user profile for "Karen (DF Mgr)".

The main content area is titled "Workflows" and contains three sections:

- Delegated to me; Incomplete:** A table with columns: PO# Supplier, Part#, Services, Requestor, Workflow Type, Date Requested, Request Age (Days), and Actions. It lists two items:
 - Card 1858 01 Admin Test Supplier, Requestor: GLOBAL, Karen (Global), Workflow Type: Documentation Folder, Date Requested: June 18, 2024, Request Age (Days): 1.
 - Card 1693-3700K Admin, Requestor: DF User 2, Karen (User 2), Workflow Type: Documentation Folder, Date Requested: October 27, 2023, Request Age (Days): 235.
- Assigned to me; Incomplete:** A table with columns: PO# Supplier, Part#, Services, Requestor, Workflow Type, Date Requested, Request Age (Days), and Actions. It lists two items:
 - Card 2001 (Manager R... Admin Test Supplier, Requestor: USER, Karen (User), Workflow Type: Documentation Folder, Date Requested: May 06, 2024, Request Age (Days): 43.
 - Card 1779 Testing Test Supplier, Requestor: USER, Karen (User), Workflow Type: Documentation Folder, Date Requested: January 20, 2024, Request Age (Days): 151.
- Requested by me; Incomplete:** A table with columns: PO# Supplier, Part#, Services, Assigned To, Workflow Type, Date Requested, Request Age (Days), and Actions. It contains the text "No data available in table".

STEP 12

The review will be performed as normal and routing back to the buyer OR onward to the next reviewer will occur. Refer to How to Review a Documentation Folder (SpendFile) under Help & Support.

SpendLogic